

2024  DIRECT TO CONSUMER
WINE SYMPOSIUM

REQUEST FOR PROPOSAL: DTC WINE SYMPOSIUM 2024
Speakers for Workshop Sessions: Submissions Due September 26, 2023

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 specific examples with quantifiable data and the presenters' public speaking skills.

For the 2024 Symposium, we are planning for an in-person conference.

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 challenges and move the industry forward

We offer the following benefits to our Workshop Speakers:

- Complimentary registration, one per speaker, to DTCWS on January 17-18, 2024, a \$750 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 November 1st, 2023 or risk having to provide their own lodging.*
- Reimbursement for mileage to/from the event at the federal mileage allowance rate
- Economy air travel will be reimbursed on a case-by-case basis, with advance approval from Jeremy Benson. *Meals and other travel incidentals are not reimbursable.*

The above benefits are only offered to confirmed speakers who deliver their presentations at the 2023 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 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.

Tuesday, September 26, 2023: Proposal Submission Deadline

- Follow the requirements above.
- *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 the audience could leverage 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.

Monday, October 16, 2023: 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 ensure we're on track with overall content richness and points of differentiation among speakers.

Participation in two formal rehearsal/recording sessions is mandatory. These virtual meetings provide real presentation practice and 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 13-November 17, 2023**
- Formal Rehearsal Date Window: **December 4-8, 2023.** *PowerPoint encouraged*
- Recording Date Window: **December 11-15, 2023.** *PowerPoint required (includes speaker headshots and titles, at a minimum, if the session has no other visual aids).* The pre-recorded sessions are considered "live takes" and will not be edited

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

Tuesday, December 12, 2023: Final PowerPoint presentations Due

Moderators will consolidate speaker presentations into one complete PPT file (not PDF), proof/edit to ensure consistent formatting and proper use of the DTCWS template, and 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 new speakers will be prioritized due to attendee survey feedback and the Steering Committee's goal to present new faces, fresh content, and different 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.

QUESTIONS?

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

For general DTCWS inquiries, please contact dtcwinesymposium@gmail.com.

The logo for the 2024 Direct to Consumer Wine Symposium. It features the year '2024' in a large, vertical, serif font on the left. To its right is a circular purple icon containing a white silhouette of a wine glass. Further right, the words 'DIRECT TO CONSUMER' are written in a smaller, all-caps, serif font, and 'WINE SYMPOSIUM' is written in a larger, all-caps, serif font below it.

2024 DIRECT TO CONSUMER
WINE SYMPOSIUM

2024 TOPICS

1. DTC STRATEGY: Elements of a Marketing Plan

Marketing and sales are often used interchangeably, but one is not like the other. The disciplines are very different but work hand in hand. In this session, we will focus on marketing, whose role is to support the brand in the market and create brand value. But how do you do that? Let's break it down to the key elements of a marketing plan and how you can create one for your winery.

Attendees will learn:

- The goals and roles of marketing and sales and how they support each other
- Key documents and roadmaps in developing a marketing plan
- Examples of deliverables of a marketing
- How to apply and track a marketing plan

COMMENTS: Seeking speakers with a proven track record as leading a marketing department but can break down complex marketing topics into concepts and tools that small wineries can use immediately. The speaker does not have to have wine experience, but consumer package goods experience is preferred for obvious context. Ideally, speakers can provide attendees with templates for tools that they can customize for their purposes.

AUDIENCE: Winery ownership, Marketing managers

CONTENT LEVEL: Intermediate to Advanced

Submissions and questions can be sent to Jessah Diaz at jdiaz@cakebread.com.

2. ADVERTISING: 2024 Winery Advertising Landscape

If the wine industry is to come out of this slump and compete with beer, cocktails, and RTD categories, we have to increase our advertising expenditure. This session is for wineries that are ready to start advertising for the first time or for wineries that are already in-market but want an overview of the current landscape. The discussion will cover advertising channels, best practices, recommended budgets, KPIs, and expected results.

Attendees will learn:

- What are the high-level advertising opportunities open to the average small to medium-sized winery
- How to define your target and goals for each campaign
- Tips to put together an advertising calendar with cadence and frequency best practices
- Examples of KPIs to track, benchmark responses, and how to project results

COMMENTS: Seeking speakers who can address the activity of planning paid advertising across multiple channels — print, online, broadcast, or outdoor. We are not looking for a deep dive into a particular channel but an overview of the opportunities. Small budgets should be assumed, and tiered options should be applied if possible.

AUDIENCE: Winery ownership, Marketing managers, Hospitality managers

CONTENT LEVEL: Beginner to Intermediate

Submissions and questions can be sent to Susan DeMatei at susan@wineglassmarketing.com.

3. WINE CLUB: The Evolution of Wine Loyalty Models: Building Future-Proof Ambassadors

It's no secret Wine Clubs are waning in popularity. Giving customers a choice slowed down the decay, but are wine clubs circling the drain? Can Wine Clubs exist digitally with tourism on the downturn? What are the latest trends shaping the loyalty landscape, and what can we learn about consumer sentiments toward existing wine club models? This session will provide ideas that can be put into practice on how wineries can adapt their approach to meet the changing needs and desires of today's consumers.

Attendees will learn:

- What cultural narratives are changing the loyalty model for consumers, and how are their attitudes changing
- Suggestions to evolve the legacy wine club model to today's digital consumer
- Ways to create value beyond special pricing, preferred shipping rates, and complimentary tastings
- Strategies to improve membership retention and create long-term brand loyalists

COMMENTS: Seeking speakers passionate about wine clubs who have new ideas to share about loyalty marketing to new consumers while keeping legacy club members engaged. It would be ideal if speakers could relay case studies or results of any new models or if analogies to other industries could be used to support recommendations. Ultimately, the presentation should have specific activities and strategies that wineries can implement.

AUDIENCE: Winery ownership, Marketing managers, Wine Club managers

CONTENT LEVEL: Intermediate to Advanced

Submissions and questions can be sent to Kelly Mantel at kelly@harneylane.com.

4. TECHNOLOGY: AI Risks and Legality — Harnessing the Evolving Best Practices

No one can deny the potential of AI for a variety of marketing purposes. For wineries struggling with staffing, it is tempting to dive into AI and give it control of social media, emails, and website content. In this seminar, we will look at specific guidelines for AI practices so attendees can avoid common mistakes. Rather than showing successful campaigns, leaving the audience curious but not knowing how to proceed, this session will discuss critical decision paths and even highlight blunders the attendees can avoid.

Attendees will learn:

- Possible uses for AI to help with DTC Marketing tasks
- Examples of dos and don'ts for the best possible outcome
- The legality and risks associated with careless use of AI and how to protect your winery and direct your team
- Best practices for AI queries
- Tools/services to try and avoid

COMMENTS: Seeking speakers who understand best practices around AI for consumer marketing. Not looking for an aspirational campaign case study but more a “nuts and bolts” how-to on using AI for marketing. Ideally, the speaker will have online resources that the attendees can use to improve their own marketing with AI and guidelines to share.

AUDIENCE: Winery ownership, Marketing managers

CONTENT LEVEL: Beginner to Intermediate to Advanced

Submissions and questions can be sent to James Lovaas at james.lovaas@korbel.com.

5. TASTING ROOM: The role of events in targeting new audiences and attracting visitors

We keep hearing that new consumers want to be entertained and look for experiences. How should traditional winery events evolve to fit into these new consumer expectations? Are the days of a release party gone, or is there still a role for classic events? If so, how should event success be measured? This session will debate these questions and shed insight into what types of activities are attracting customers.

Attendees will learn:

- Trends in experiences that wineries can lean into to attract guests
- Pitfalls in creating complex events/experiences and how to gauge and measure success

- How to plan for new audiences without alienating classic club members who like the standard events

COMMENTS: Seeking speakers with experience and trial in a variety of events and customer experiences. If case studies are available, please share executional tips, marketing, and metrics. Ideally, the attendees will be inspired by creative ideas and take best practices back to their wineries.

AUDIENCE: Winery ownership, Marketing managers, Tasting Room managers

CONTENT LEVEL: Intermediate to Advanced

Submissions and questions can be sent to James Lovaas at james.lovaas@korbel.com.

6. SOCIAL MEDIA: Elevating Your Social Media Beyond Mundane Bottle Shots

Decode the art of captivating your audience, no matter the size of your budget or the expanse of your brand. From understanding what draws consumers to your feed to fostering genuine engagement across diverse platforms, attendees will hear case studies and leave with tangible recommendations and best practices to use at their wineries.

Attendees will learn:

- Why consumers aren't following you and what they're looking for in your feed
- Concepts to keep your social media content fresh and relevant — no matter the budget
- Ways to foster authentic engagement across multiple social media platforms
- How to prioritize social media when there's a thousand other things to do

COMMENTS: Seeking speakers with social media content experience and creative ways to entice engagement out of their audience. We're looking for unique and out-of-the-box ideas and case studies.

AUDIENCE: Marketing managers, Social Media managers

CONTENT LEVEL: Beginning to Intermediate

Submissions and questions can be sent to Kelly Mantel at kelly@harneylane.com.

7. EMAIL: The {four} emails you should be sending right now.

Email has gone beyond the mass send of one size fits the entire database. Today's marketer has drip campaigns, recontact strategies, and advanced segmentation. Of all the potential strategies, this session will dissect the top must-have campaigns for email, along with case study examples and benchmark metrics.

Attendees will learn:

- Email segmentation — What is the low-hanging fruit you should be doing today
- Drip campaigns and flows that every winery should set up
- Real-life examples and how they performed
- Campaign execution best practices

COMMENTS: Seeking speakers with strong campaign results and recommendations on the top emails wineries should be sending. Real examples and results are ideal.

AUDIENCE: Winery ownership, Marketing managers

CONTENT LEVEL: Intermediate to Advanced

Submissions and questions can be sent to Susan DeMatei at susan@wineglassmarketing.com.

8. LUXURY: How to sell non-essential products in a “cautious” economy.

All luxury items must re-invent themselves; just look at fashion. How can the wine industry position itself to new consumers as a luxury product with today’s priorities centered around sustainability and corporate mission rather than exclusivity and access? What changes do we need to make, and are there any other industries we can learn from that are doing it successfully?

Attendees will learn:

- Profile of today’s luxury buyer and their motivations
- How can wine find a place of value in the luxury lifestyle
- If changes need to be made, what will need to be communicated to current consumers
- What are some ideas a winery can implement without a huge budget

COMMENTS: Seeking speakers with a luxury marketing background. It would be interesting if it is outside of wine, but it can also be wine as long as it is a new and innovative approach.

AUDIENCE: Winery ownership, Marketing managers, Hospitality managers, Wine Club managers

CONTENT LEVEL: Intermediate to Advanced

Submissions and questions can be sent to Jessah Diaz at jdiaz@cakebread.com.

9. DTC STRATEGY: Mastering DTC Strategy: Your Blueprint for Effective Marketing Excellence

Uncork the intricacies of devising an impactful marketing strategy that resonates with your audience and drives tangible results. Whether you're a seasoned DTC expert or just starting your

journey, this workshop equips you with the tools and knowledge to orchestrate a comprehensive marketing plan that's both effective and impressive.

Attendees will learn:

- How to craft an effective marketing strategy that drives sales and makes you look good
- Simple tools and templates to manage your complete marketing plan, including events, paid advertising, budgets, and promotions
- Ways to get the entire team on the same page and excited about the marketing plan
- What tactics you should try this year and what you should stop now

COMMENTS: Seeking speakers with a desire to share tools, templates, and best practices to help overwhelmed wineries organize their marketing and move forward.

AUDIENCE: Winery ownership, Marketing managers, Social Media managers

CONTENT LEVEL: Beginner to Intermediate

Submissions and questions can be sent to Kelly Mantel at kelly@harneylane.com.