

**PRESENTED BY** 







Welcome to:

## Brand Better ... or Die Trying

NOTE: No attendees will be harmed during this presentation. We hope.

Welcome to:

**Brand** 





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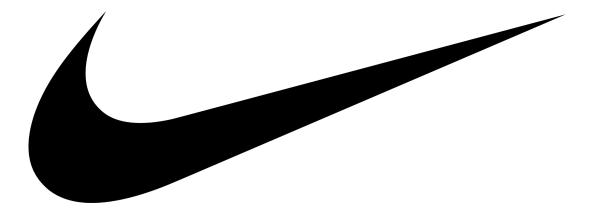


#### **WELCOME!**

### Housekeeping Checklist

- Who we are
- ☐ Have fun, no one is going to die
- You will get all of this digitally
- There is a worksheet on your seat, keep it handy
- □ Have your phones available

# Section I: Messaging Matters











## Listen Carefully...



## "Just Do It"

## "I'm Lovin' It"

## "Think Different"

## "Finger Lickin' Good"

#### **BRANDS ARE GOOD MONEY:**

## YOU WORK FOR A WINERY, THE GOAL IS TO MAKE MONEY (RIGHT?)

1. Forbes reported that consistent brand presentation can increase revenue by 23%

- 43% of customers spend more money on brands they are loyal to
- 3. 81% of customers refuse to do business with a brand they don't trust

IS YOUR BRAND MESSAGE ACTUALLY LANDING?

### QUICK ACTIVITY: "SILENT AUDIT"

Take your three sticky notes and write down your winery's:

- 1. Core message in 5 words
- 2. Target customer description in 5 words
- 3. Key differentiator in 5 words

Then, return them your folder. We'll come back to them later.

#### **SILENT AUDIT EXAMPLE:**

#### McDonald's

- 1. Core Message:
  Fast, Familiar Food
  for Everyone // "I'm
  Lovin It, Every Time"
- 2. Target Customer:
  Value-Seeking
  Families On The Go
- 3. **Key Differentiator:**Consistent Quality
  Everywhere You
  Go

## Message Health Framework

Case studies, the great and not-so-great, and how to check yourself before you ... well, you know.



### Real World Message Testing





Adobe

- Before: "Email Marketing Platform"
- After: "Marketing Platform for Small Business"
- Result: 37% increase in new sign-ups

- Before: "Live Chat Software"
- After: "Revenue Acceleration Platform"
- Result: 52% increase in enterprise leads

- Before: "Creative Suite" (one-time purchase)
- After: "Creative Cloud" (subscription service)
- Result: 45% increase in recurring revenue

#### **GREAT MESSAGING:**

## patagonia®

"We're in business to save our home planet."

Clear Purpose
Authentic to Brand Actions

#### **GREAT MESSAGING:**

#### THE ORIGINAL



### "It's like milk but made for humans."

**Clear Differentiation & Memorable** 

#### **GREAT MESSAGING:**



"Better things in a better way."

Consistent across all channels

Communicates product quality + company values

#### **NOT-SO-GREAT MESSAGING:**



#### "Live For Now"

Too Vague Disconnected From product

#### **NOT-SO-GREAT MESSAGING:**



"Do. It. Together."

Confused existing customers
Didn't attract new ones

#### **NOT-SO-GREAT MESSAGING:**



"Das Auto."

Lost distinctive voice and authenticity

#### TIME FOR A CHECKLIST!

### YOUR BRAND HEALTH DIAGNOSTIC TOOL

- Website home page first 100 words
- □ Last 5 social posts
- Most recent email newsletter
- Tasting room script
- Wine club welcome letter

#### **Message Consistency Check**

### QUICK ACTIVITY: AUDIT YOUR BRAND

- Get out your phones.
- Grab the Message Consistency Sheet we provided.

1. On your phone, pull up:

- 1. Winery website
- 2. Most recent marketing email
- 3. Social media bio

2. On your sheet, jot down:

- Repeated phrases
- Value propositions
- Emotional triggers

THE RESULTS ARE IN...

Get those sticky notes you wrote your series of five words on.

Compare it to your audit sheet.

How did you do?



## Section II: Finding Your Core



### Facts & Figures

Narrative

The Core Belief

#### YEAR FOUNDED

**SCORES** 

**AWARDS WON** 

LEVEL 1:

Facts & Figures

**CASES PRODUCED** 

**ACRES FARMED** 

Colgate –"The Most Trusted toothpaste in the world"

Barefoot Wine – "The Most Awarded wine brand in the world"

E. & J. Gallo Winery –"The World's Largest Family-Owned Winery.

**Budweiser – "The King of Beers"** 



## Facts & Figures

Pros:

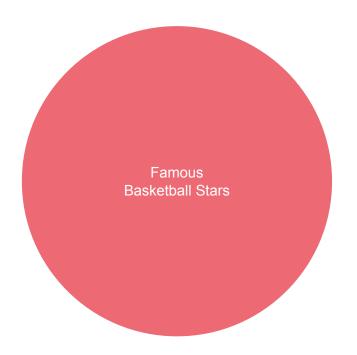
- They're easy to identify
- They're easy to understand

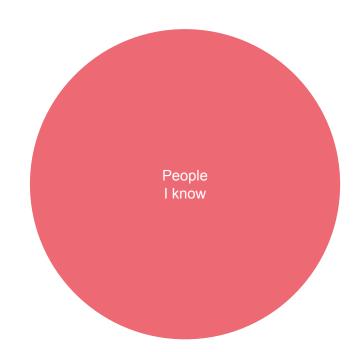
Cons:

- Circumstances can change
- They often aren't unique
- They don't necessarily move people
- They can hide a weak core

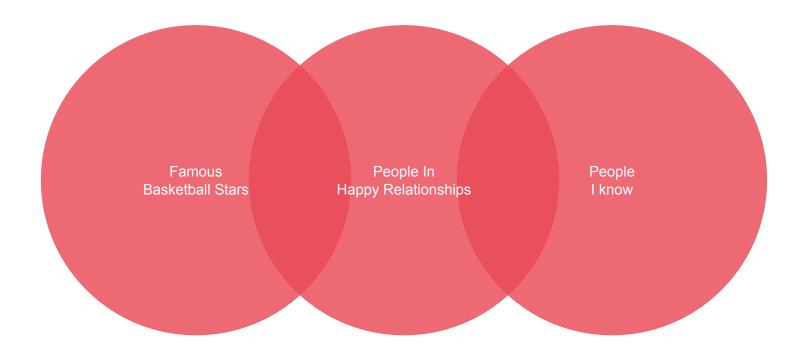
Pretty Darn Good
Kinda Coveted
What if you're (Big-ish Fifth ) not the best or biggest?
Higher than Average

#### People I know





#### People I know



## They Rely on Personality.

Show the public that deep down, you are a unique, interesting person-they want to be around.

**BRAND** 

## Okay, But How?



### Just being yourself isn't enough

We need to be true to ourselves, but we must tailor and refine our truth.





## **Brand Narrative**



"Heritage Valley Winery is a family-owned winery dedicated to crafting quality wines that capture the essence of our region, combining time-honored traditions with innovation and sustainability to create exceptional experiences for wine lovers."



"When my grandfather John Williams got it into his head that Red Mountain might be a great place to grow grapes, people thought he was nuts. Now people call Red Mountain one of the premier grape-growing regions in the New World. We just call it home."



#### DON'T:

"Heritage Valley Winery is a family-owned winery dedicated to crafting quality wines that capture the essence of our region, combining time-honored traditions with innovation and sustainability to create exceptional experiences for wine lovers."



#### DO:

"When my grandfather John Williams got it into his head that Red Mountain might be a great place to grow grapes, people thought he was nuts. Now people call Red Mountain one of the premier grape-growing regions in the New World. We just call it home."

"[F]acts do not illuminate us. If facts were truth, the Manhattan phone directory would be the book of books."

—Werner Herzog

# Our brains are not designed to remember details, they are designed to remember feelings.





#### **MAKE YOUR STORY BETTER**

- 1. Write out y
- 2. Find the themes
- 3. Pick the most resonant one
- 4. Rewrite to empha

#### WRITE YOUR STORY:

- 100 Words
- 50 Words
- 25 Words
- 4 Words That's (maybe) your tagline



## **Brand Narrative**

#### Pros:

- Can be powerfully resonant
- If it's good enough it's transmissible, like a virus
- It's (hopefully) true!

Cons:

Your story just might not be that interesting...

55



## Find your core belief.



#### DON'T:

"We believe in making quality wine."



#### DO:

"We owe it to our customers to be good and we owe it to our grandparents to do good."

## The best core beliefs transcend the particulars of what the company does

## How do we find our core belief?

# Take a character's actions and ask why—repeatedly—until you find backstory.

- "Kyle bails on a date with his girlfriend to do a favor for his boss"
- —Why does he do that?
- "Because he wants a promotion"
- —Why?
- "Because he wants respect."
- —Why does Kyle need respect so badly?
- "Because when he was a kid, the other kids made fun of him because his family couldn't afford nice things."

"Kyle bails on a date with his girlfriend to do a favor for his boss"

—Why does he do that?

"Because he wants a promotion"

—Why?

Respect from others will make me feel validated

—Why does Kyle need respect so badly?

"Because when he was a kid, the other kids made fun of him because his family couldn't afford nice things."

Every company's actions are driven by a set of core beliefs, most just don't go deep enough to find a theme.

"We use old world techniques coupled with innovative farming practices"

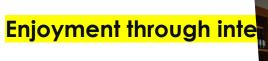
"Because we think that makes the highest quality wine"

— Why does the quality matter?

"You can savor quality. Life is better when enjoyed with intention."

—Why do you believe that?

"Because when I was a kid my grandfather used to make me pause when I was about to eat a dessert or something, he'd always make sure I really savored it. It taught me about the importance of living in the moment."





### Facts & Figures

Narrative

The Core Belief

## Section III: Brand Better

2025 Direct to Consumer 67



## YOUR BRAND IS ALREADY THERE (IT'S JUST PLAYING HIDE AND SEEK)

#### LET'S DIG IN:

#### The magic is already there:

- in their social posts
- email campaigns
- team conversations
- customer experiences



# Our job wasn't to create something new, but to uncover what was already there

**READY OR NOT... HERE WE COME** 

# EVERY TOUCHPOINT TELLS YOUR STORY:

#### Digital

- Website Content
- Email Signatures
- Wine Club Portal
- Auto-Responses
- Social Media

#### **Physical**

- Tasting Room
- Packaging
- Printed Materials
- Retail Displays
- Shipping Items

#### **Events & PR**

- Festival Materials
- Press Kits
- Trade Shows
- Wine Lists
- Award Submissions

#### **Internal Documents**

- Employee onboarding materials
- Training manuals
- Internal newsletters

#### **WEBSITE DEEP DIVE**

"Because raising a glass can make a difference, too"

"Boutique exceptionalism coupled with radical inclusion"

"...we set out to create exceptional wine that is not only notable, but notably generous"



## STORY





#### Catherine

Dear Catherine, I loved you the firs

#### 100% SYRAH WALLA WALLA VALLEY

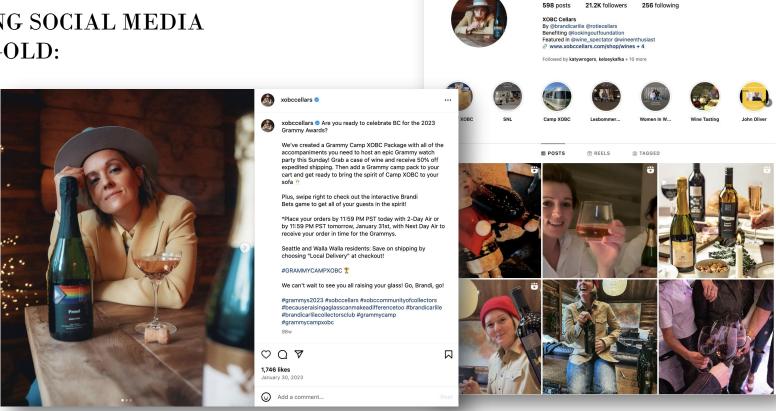
XOBC Cellars was founded in 2019 by multi Grammy winning artist Brandi Carlile, her wife Catherine, and their friends, Jeri and Amy Andrews. Their wines showcase the quality and refinement that makes Washington wine unparalleled XOBC Cellars has struck a chord that's rarely, if ever been heard - boutique exceptionalism coupled with a culture of rugged and radical inclusion. These women fused music and wine with a common goal of making a difference by donating proceeds from XOBC Cellars to Brandi's Looking Out Foundation. At two cultier, showcasing female & LGBTQ+ leadership, this team of women in wine has raised the bar for the entire industry.

RED WINE PRODUCED AND BOTTLED BY XOBC CELLARS IN WALLA WALLA, WA.

GOVERNMENT WARNING:(1) ACCORDING TO THE SURGEON GENERAL, WOMEN SHOULD NOT DRINK ALCOHOLIC BEVERAGES DURING PREGNANCY BECAUSE OF THE RISK OF BIRTH DEFECTS. (2) CONSUMPTION OF ALCOHOLIC BEVERAGES IMPAIRS YOUR ABILITY TO DRIVE A CAR OR OPERATE MACHINERY, AND MAY CAUSE HEALTH PROBLEMS.



#### MINING SOCIAL MEDIA FOR GOLD:



xobccellars 🐡

Message · · ·

# EMAIL: YOUR BRAND VOICE IN THE WILD



🍾 XO Sparkling Rosé: The Wait is Over! 🥂

Alright pals!

I have something awesome to tell you. This is a message for our XOBC Collectors AND you looky-loo XOBC enthusiasts who are not yet Collectors! lol

We had such a long pause at XOBC...and we are SO determined to superserve you in the coming days that we went hard and achieved something that many of you have been asking for. I can't tell you exactly what it is, but it's very bubbly, the perfect color pink, and it starts with XO...

Ok, ok, ok...our XO SPARKLING ROSÉ IS BACK! Mark your calendars...

#### Monday, December 9th

The best news is that if you **order Monday when it's released**, we have time to get it to you by CHRISTMAS and NYE!!! It makes a great gift, it gives back to the <u>Looking Out Foundation</u>, and the best part about shipping bubbles is that they love the cold. W

#### **Bubbles with a Purpose**

XO Sparkling Rosé is your go-to for life's celebrations at just \$28 per bottle.

It has a subtle and sophisticated light peach color in the glass, reminiscent of a sunset at sea. The nose is fresh with notes of ripe nectarine and honeydew melon. Vibrant flavors of wild strawberry and ruby grapefruit give way to a perfectly balanced effervescence.

As always, made by hand in Brandi's home state to support the <u>Looking Out Foundation</u>.







#### MISSION:

To produce exceptional Washington wines while driving social change through radical inclusion and charitable giving.

#### VISION:

To revolutionize the wine industry by proving that boutique wines can unite diverse communities and drive meaningful social change through inclusive leadership and purposeful giving.

#### **VALUES:**

- Quality Winemaking
- Radical Inclusion
- Community Impact
- Social Responsibility
- Innovation

## TIME SAVED = MONEY SAVED



#### **ONBOARDING & APPROVALS**

- ✓ 5 hours saved in initial brand discovery meetings
- ✓ Copy approval time: 2 weeks  $\rightarrow$  2 days
- √ 30% reduction in consulting costs

#### **CONTENT CREATION**

- ✓ 50% faster promotional material development
- ✓ Email campaigns: 40% faster production
- ✓ Social content calendar time cut by 50%

#### **TEAM RESULTS**

- ✓ Accelerated new team member onboarding
- ✓ Consistent customer experience across all channels
- ✓ Clear framework for faster marketing decisions

#### WHO DOESN'T LIKE MONEY?

### BRAND PLANNING = BIGGER PROFITS

#### **BUSINESS RESULTS**

- 1 Increased wine club conversion at events
- Premium pricing power through clear value proposition
- Audience growth: music fans becoming wine enthusiasts
- † Enhanced media coverage with consistent messaging

#### **COMMUNITY IMPACT**

- ↑ Increased user-generated content
- Expanded partnership opportunities
- † Higher customer lifetime value
- † Improved email engagement metrics

"Every minute you spend in planning saves 10 minutes in execution; this gives you a 1,000% return on energy! Plan, Plan, Plan!"

- Brian Tracy, Author & Speaker

## **Tools Tools**

You made it! Still alive?



## Key Takeaways + Next Steps

#### **Key Takeaways**

- Great brands tell authentic stories that resonate focus on what makes your winery uniquely you
- Consistency across channels builds trust audit your messaging regularly
- Your brand already exists in how you operate your job is to capture and amplify it

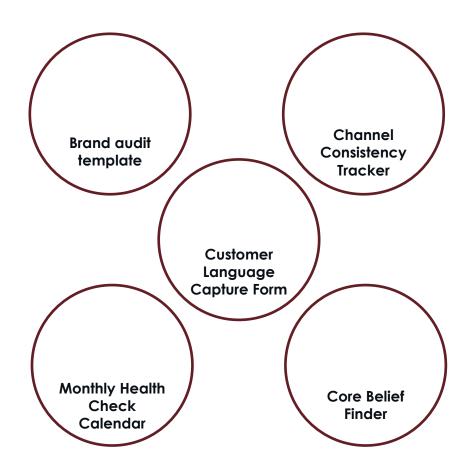
#### **Your Next Steps**

- Complete the brand audit using the provided templates
- Schedule monthly brand health checks with your team
- Document your brand voice and keep it accessible to all team members

Remember: Brand better, not harder!

YOUR HOMEWORK (THE FUN KIND)

Included in your handout folder is a QR code to the following tools:





## Thank You

P.S. There are snacks.





Scan for all the goodies:)