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Plunder & Profit:

A Pirate's Guide to Email Automation

Ahoy, Matey! *What's your Pirate Name?*

THE FIRST LETTER OF YOUR LAST NAME.

A- Captain
B- Sneaky
C- Stubby
D- Mad
E- Swashbuckling
F- Grubby
G- Fishy

H- Plunderin'
I- Buccaneer
J- Jolly
K- Ruthless
L- Old
M- Greedy
N- Stinky

O- Daring
P- Squinty
Q- Dirty
R- Clammy
S- One-eyed
T- Cracked
U- Bloody

V- Stink-eye
W- Prickly
X- Drunken
Y- Swampy
Z- Salty



YOUR FAVORITE PET'S NAME.



YOUR BIRTH MONTH.

January- the Peg Leg
February- the Cruel
March- the Treasure Hungry
April- the Rascalion
May- the Dread
June- the Landlubber

July- the Freebooter
August- McBludgeon
September- the Overboard
October- the Mutineer
November- the Squeamish
December- the Marauder



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Today's Email Voyage

1. Best Practices

2. Flow Demonstrations

Abandoned Cart (Basic + Advanced)

Re-Engagement

Page Browse

SMS Flow Using RedChirp

3. Internal Alerts

4. Q & A





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Polly Wannacracker



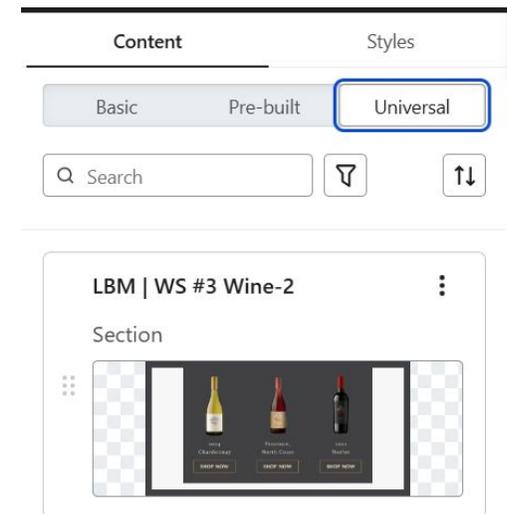
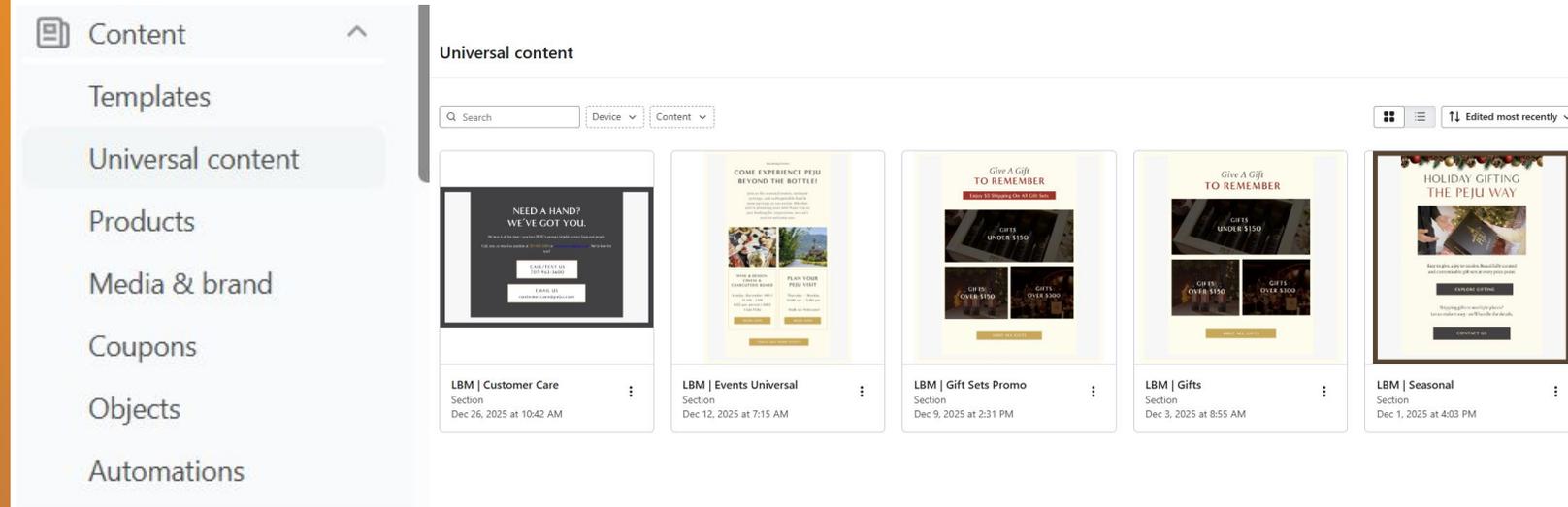
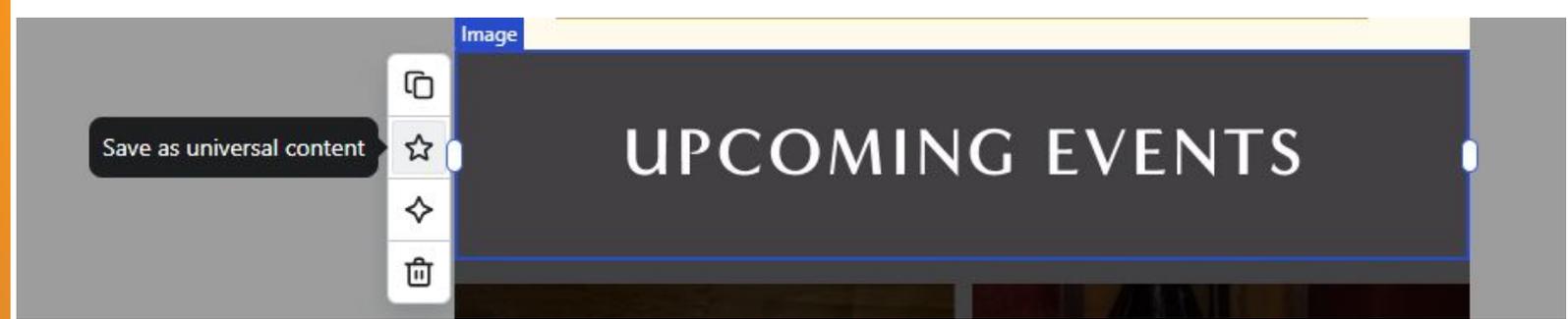
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Charting the Course: Best Practices

Best Practices: Universal Content

Invest the time to centralize content—headers, footers seasonal call outs, shop CTAs, event modules, and more!

Build once. Update everywhere.



Best Practices: Pass the *Glance Test*

Most consumers will thumb through your email very quickly on a mobile device.

Make sure key elements catch the eye.

The test: if the reader were to only read the headlines and CTAs in a short few seconds, **would they get the gist of your email?**

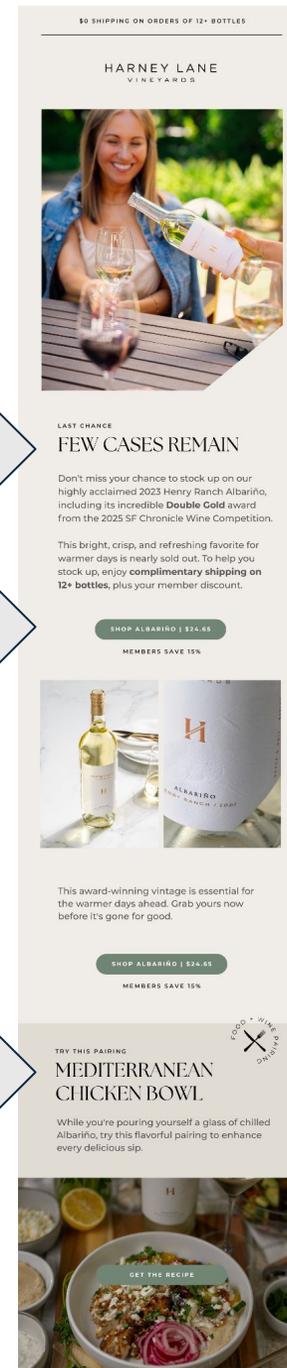
Purpose is brief and punchy



CTA is clear and repeated at least once



Secondary CTA supports the primary



Best Practices: Template Collection

Build a **library of past email layouts** and designs to reference when building something new.

Save time: leverage layouts and designs that worked in the past.



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Pirate Booty Bird's Eye View:
Image-Based vs Native Text
Emails



Best Practices: Naming Conventions

For **quick reference** and to **avoid mistake** (wrong segment to wrong email), use a consistent naming convention for campaigns, lists/segments, flows, templates, and images.

Suggested Formatting:

date_series_purpose/offer_segment



Example for Campaigns and Lists/Segments:

20260124_dry-january_15%-off-restock_first-time-customer

20251013_welcome-email-1_best-sellers-set_prospects

Example for Images:

20260124_dry-january_15%-off-restock_hero

20260124_dry-january_15%-off-restock_six-bottle-rose-pack



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All Hands on Deck: Flow Demonstrations

Demo: Abandoned Cart

It's time to target customers who have left treasure in their cart.

Across all e-commerce, over **70% of carts are abandoned** on the first checkout attempt.

70.1% Baymard Institute

48% of users abandon their carts because "**Extra costs were too high**" (shipping, taxes, and fees)

Baymard Institute

Sending the **first recovery email within 1 hour** of abandonment leads to an average conversion rate of **20.3%**. If you wait 24 hours, that conversion rate drops to 12.2%.

Klaviyo Benchmarks

A **3-email sequence generates 69% more orders** than a single abandoned cart email.

Klaviyo Benchmarks

Demo: *Basic* Abandoned Cart Flow

2 Email Series - Club vs Non Club with Red Chirp webhook

Trigger Metric: Started Check out
Trigger Filter: Sales Channel = Web

Conditional Split #1 : Commerce7 Tag = Active Club

Yes: Member Flow

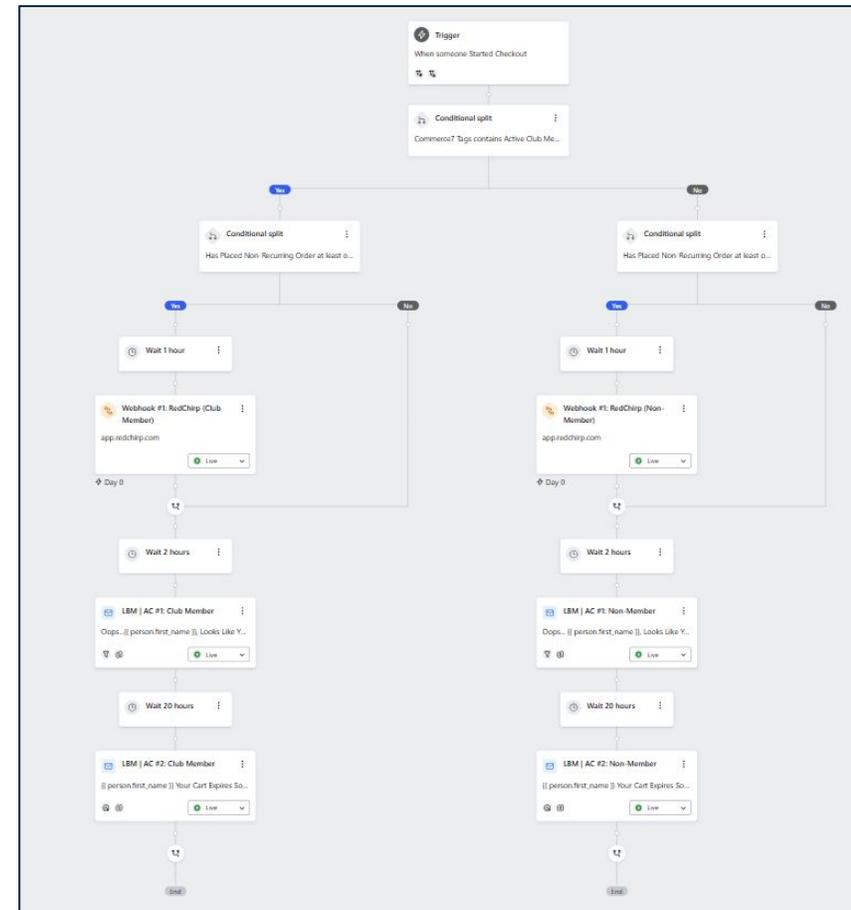
No: Non Member Flow

Conditional Split #2: Has placed order at least one in the last year

Yes: Redchirp webhook (sent after 1 hour)

No: First AC email (sent after 2 hours)

Second AC email (sent after 20 hours)



It's clear you've got an eye (and palate) for the good stuff. Come back, to complete your purchase and make these hard-to-find wines yours.



SHOP BY CLUB MEMBERSHIP



Demo: *Basic* Abandoned Cart Flow



Cell content

Text
 Image

Heading 3 ▾ Minerva Mode... ▾ 24 px

B *I* :

```

{{ item.ProductName }}
Quantity: {{ item.Quantity|floatformat:0 }} —
Price: {{ item.ItemPrice|default:" }}
Total Price: ${{ item.RowTotal|default:" }}

```

Alt Text

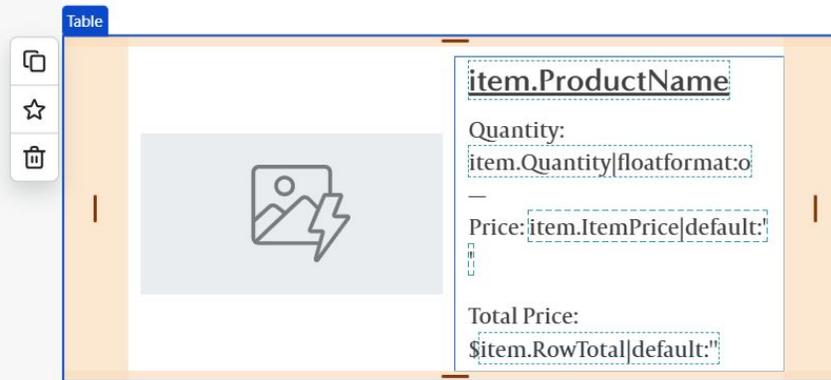
Brief description of your image

Complete Your Purchase

Link address

{{ event.CheckoutURL }}

It's clear you've got an eye (and palate) for the good stuff! Come back to complete your purchase and make those bottles officially yours.



It's clear you've got an eye (and palate) for the good stuff! Come back to complete your purchase and make those bottles officially yours.



2023 Cabernet Franc

Quantity: 12 —
Price: 64.00

Total Price: \$768.00

COMPLETE YOUR PURCHASE

Demo: *Advanced* Abandoned Cart Flow

Conditional Split #1 : Commerce7 Tag contains **Prospect**

Yes: Non-member flow

No: Conditional Split #2

Conditional Split #2 Commerce7 Tag contains **First Time Customer**

Yes: First Time Customer flow

No: Conditional Split #3

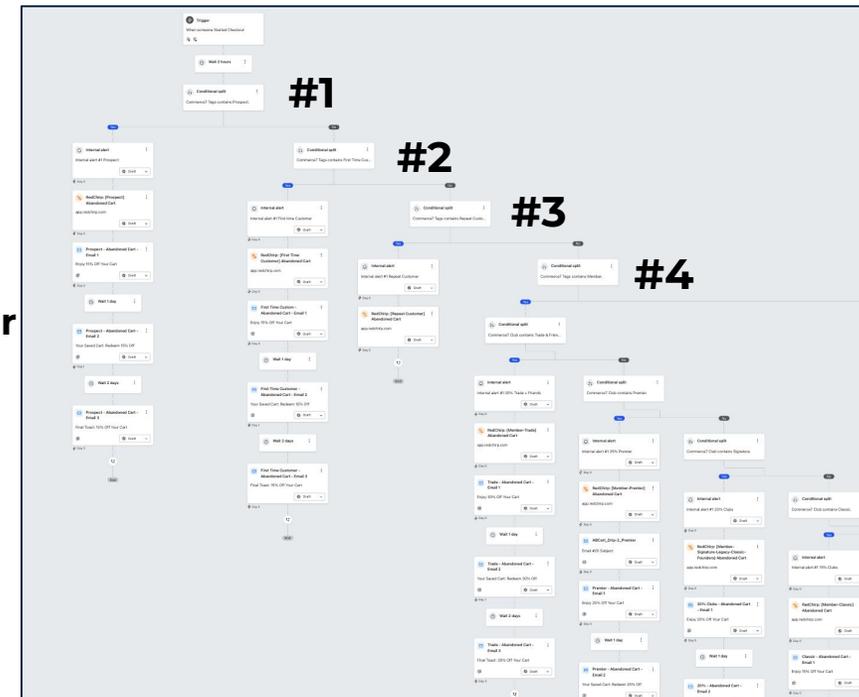
Conditional Split #3 Commerce7 Tag contains **Repeat Customer**

Yes: Repeat Customer Flow

No: Conditional Split #4

Conditional Split #4 Commerce7 Tag contains **Member**

(and so on.....)



HARNEY LANE VINEYARDS

YOUR NEW FAVORITE WINE AWAITS
ENJOY 15% OFF THIS ORDER

Grace, Lot 25

The elegant, delicious flavors of Harney Lane that caught your attention are still patiently waiting for you, though we can't promise they'll remain reserved for long.

Use code: NEXTSIP to enjoy 15% off this purchase.

REDEEM 15% OFF

ENJOY MORE PERKS
BECOME A MEMBER TODAY

- ESTATE-GROWN WINES
- PREFERRED PRICING
- DISCOUNTED SHIPPING
- COMPLIMENTARY INVITATIONS
- CUSTOMIZABLE ORDERS
- SPECIALS

EXPLORE MEMBERSHIP

Demo: Re-Engagement Flow

We'll use data as our compass to locate disengaged customers and guide them back to our brand.

It is **5 to 25 times more expensive** to acquire a new customer than it is to keep an existing one.

Harvard Business Review

Members who do not engage (visit, open emails, or purchase) between club runs are **2.5 times more likely to cancel** their membership during the next allocation cycle.

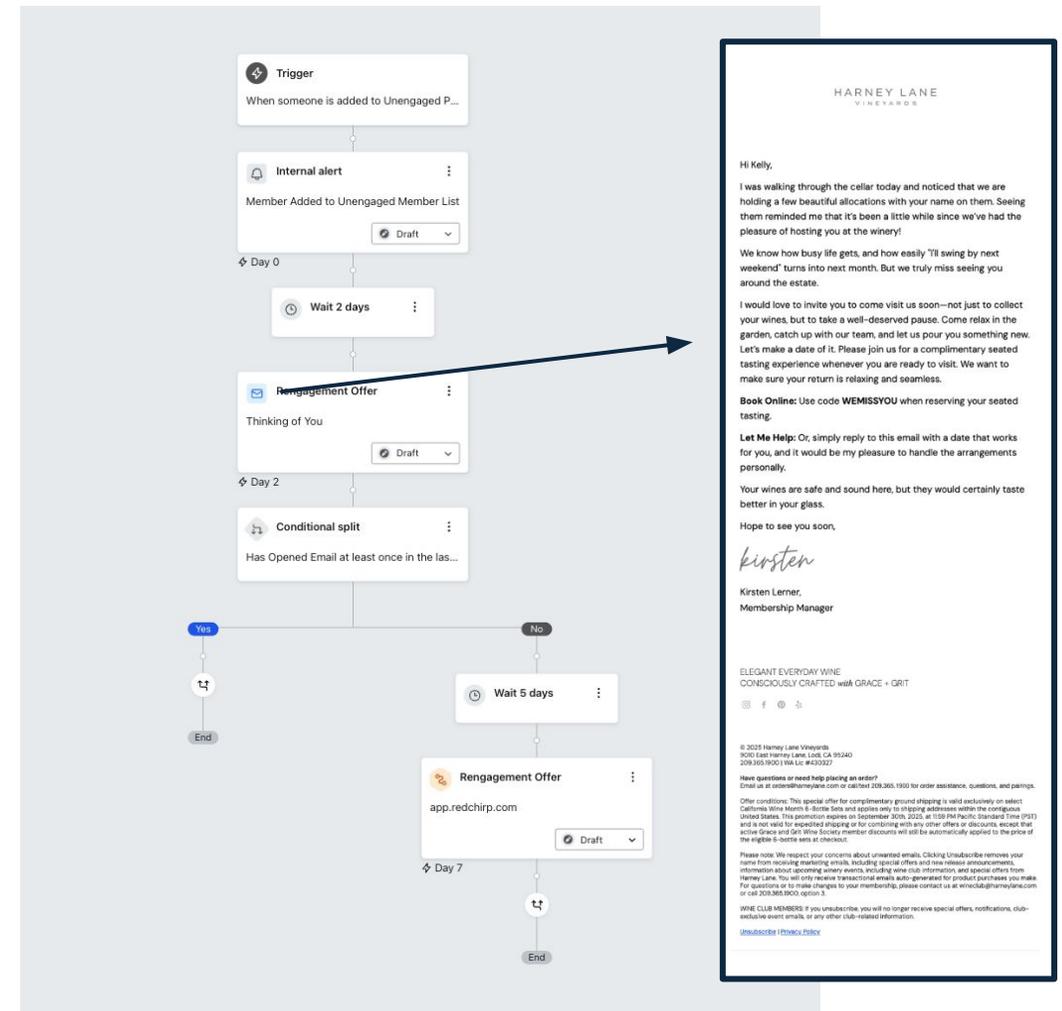
Enolytics

The risk of permanent churn increases significantly after **90 days** of inactivity. Re-engagement flows triggered at day 90 see a **14% higher recovery rate** than those triggered at day 180.

Enolytics

Demo: Re-Engagement Flow

- 1. Trigger:** Added to “Unengaged List”
- 2. Internal Alert:** Notifying team a contact has been added to the “Unengaged List”
- 3. Time Delay:** 2 Days
- 4. Email:** Re-Engagement Offer
- 5. Conditional Split:** Has Opened this Email in the last 2 days
- 6. Time Delay:** 5 Days
- 7. Re-Engagement Offer Text**



Demo: Page Browse Triggers

2 Email Series - Non Club Member Browsing Membership Page

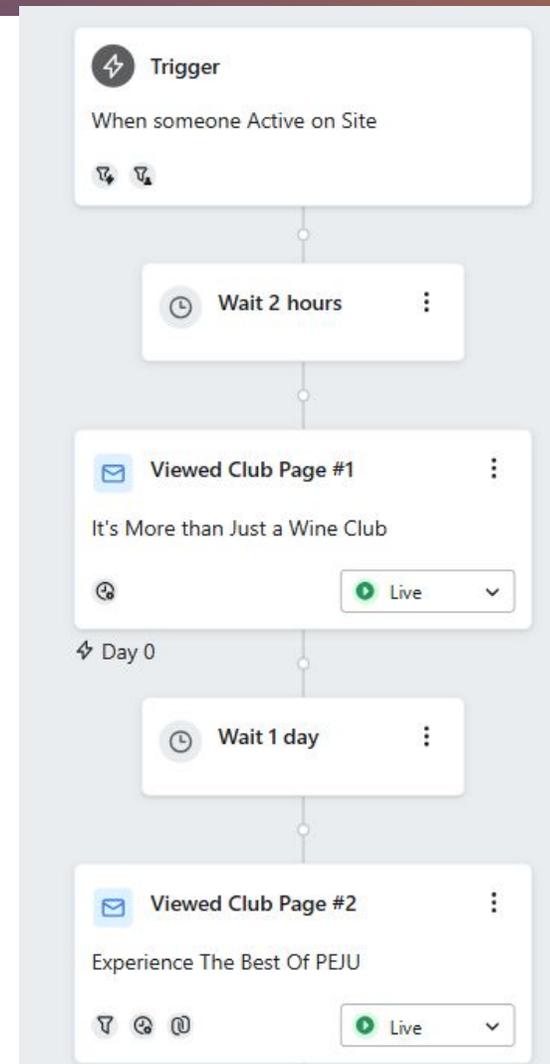
Trigger Metric: Active on Site

Trigger Filter: URLs for Join Club page

Profile Filters: Started Club 0 times since starting this flow, and C7 Club is empty

First email (sent after 2 hours)

Second email (sent after 1 day)



Potential Page Browse Triggers

- 1. Visit / Tasting Page** - Encourage visitation, tasting experience overview, booking CTA
- 2. Events Page** - Upcoming events, event recap content, event reviews
- 3. In-Home Tasting Page** - How it works, ideal occasions, testimonials, inquiry CTA
- 4. 90+ Point Wines Page** - Critical acclaim, what the scores mean,
- 5. Best Sellers Page** - Customer reviews, testimonials, “why guests love these wines”
- 6. Gift Sets / Gifting Page** - Occasion-based gifting ideas, seasonal reminders, personalized gifting services
- 7. Sustainability / Estate Page** - Winery history, vineyard practices, values-driven messaging



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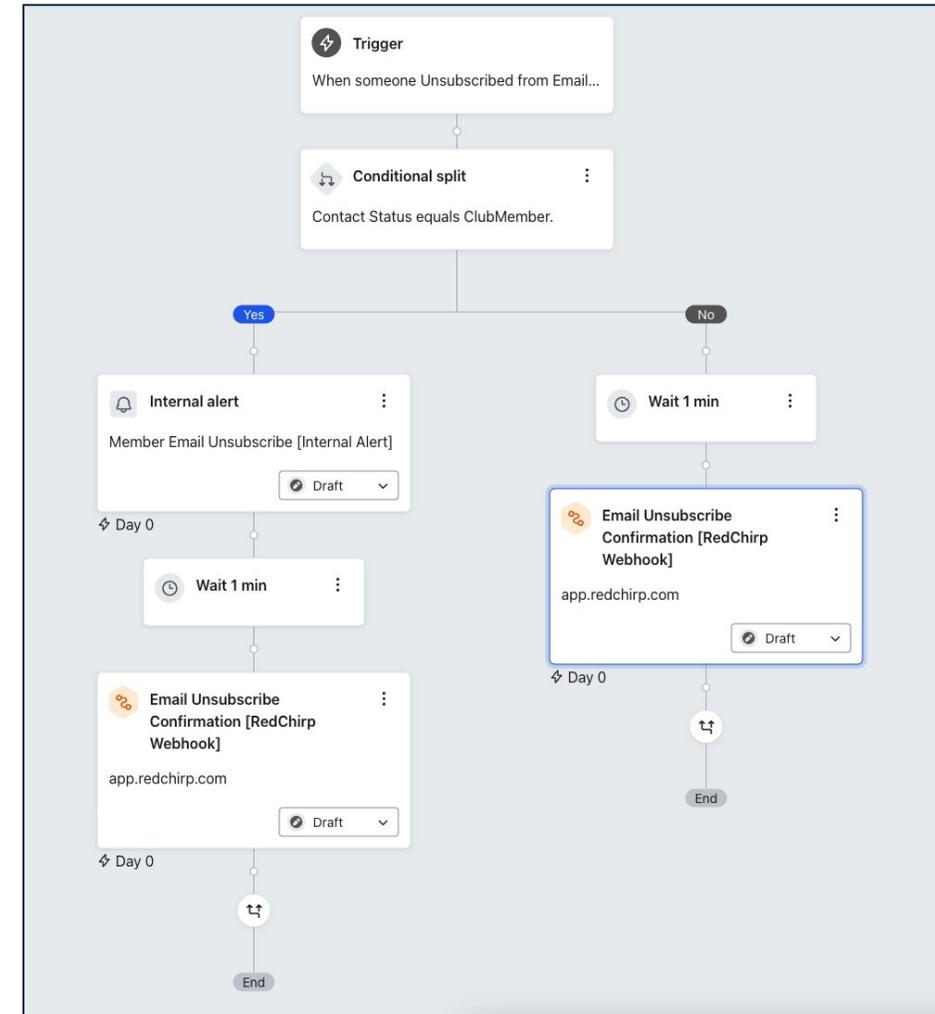
Booty-Blasting Brain Break: Fewer vs More Emails



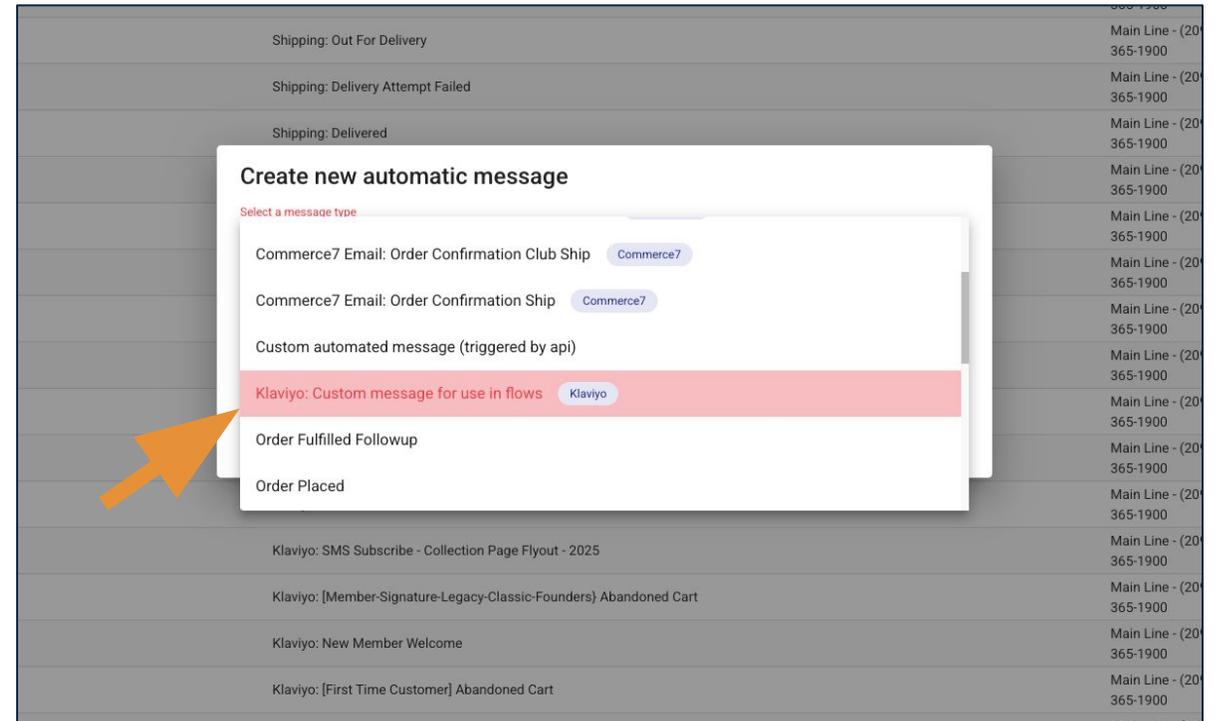
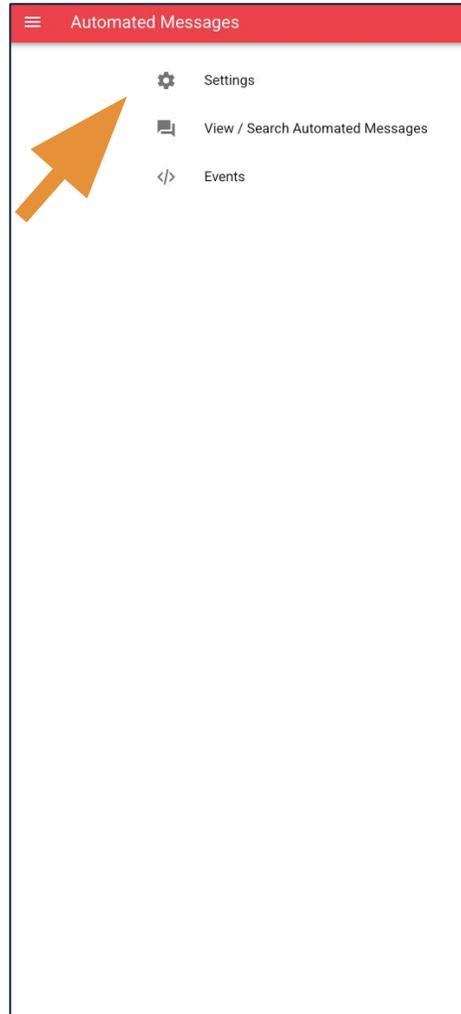
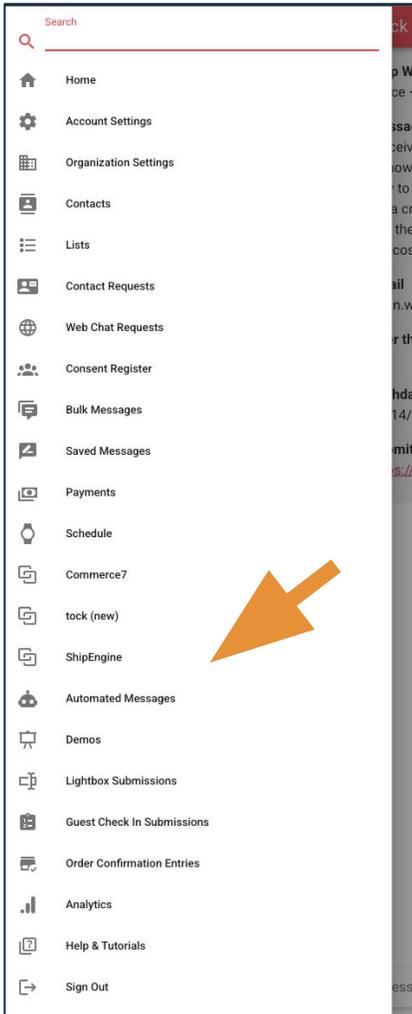
Demo: SMS Flow (using RedChirp)

Example Shown: Unsubscribe Confirmation Text

- 1. Trigger:** Metric > Unsubscribed from Email Marketing
- 2. Conditional Split:** Properties about someone > Contact status > Equals > Club Member
- 3. Time Delay**
- 4. Set Up Automated Message in RedChirp**
- 5. Web Hook:** Copy/Paste URL and JSON Body



Demo: SMS Flow (using RedChirp)



Demo: SMS Flow (using RedChirp)



Settings: Klaviyo: Email Unsubscribe Confirmation

Message Settings

Send Mode
Automatic

Message Patterns
(brand-label): Hi (first-name), we noticed you recently unsubscribed from our emails.

Just so you know: updates, event invitations, new releases, and special offers are all sent by email. By opting out, you won't receive any of these special messages. You'll only receive transactional emails when making a purchase.

If you opted out by accident, simply reply to this text and we'll make sure you continue receiving emails from us.

Text STOP to stop.

> Advanced Settings

Send During Hours (America/Los_Angeles)

> All Day Daily

Klaviyo Instructions

URL
https://app.redchirp.com/api/v1/webhook/inbound/klaviyo/8f504a4a-368d-4d35-ace6-336540417266

JSON Body

```
{
  "red_chirp_template_subject_id" : "97bb7c23-4870-43aa-9dc1-3650f38dc680",
  "first_name" : "{{ person.first_name }}",
  "last_name" : "{{ person.last_name }}",
  "email" : "{{ person.email }}",
  "phone_number" : "{{ person.phone_number }}"
}
```

For details on how to add a webhook to a flow in Klaviyo [click here](#).

Note: RedChirp will, to the best of its ability, automatically populate missing customer profile fields. For example, if a Klaviyo customer profile has email address but is missing a phone number, but you have a RedChirp contact that has the same email address, then that RedChirp contact will be automatically used to fill in the phone number. If a contact has multiple phone numbers associated with it, and Klaviyo does not specify the phone number to text, then **all** phone numbers associated with the contact will be texted (provided they are SMS capable).

Sending Restrictions

Attempt to exclude recipients without **informational** consent

Attempt to exclude recipients without **promotional** consent

Demo: SMS Flow (using RedChirp)

Settings: Klaviyo: Email Unsubscribe Confirmation

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{brand-label}: Hi {first-name}, we noticed you recently unsubscribed from our emails.

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JSON Body

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{
  "red_chirp_template_subject_id": "97bb7c23-4870-43aa-9dc1-3650f38dc680",
  "first_name": "{{ person.first_name }}",
  "last_name": "{{ person.last_name }}",
  "email": "{{ person.email }}",
  "phone_number": "{{ person.phone_number }}"
}
```

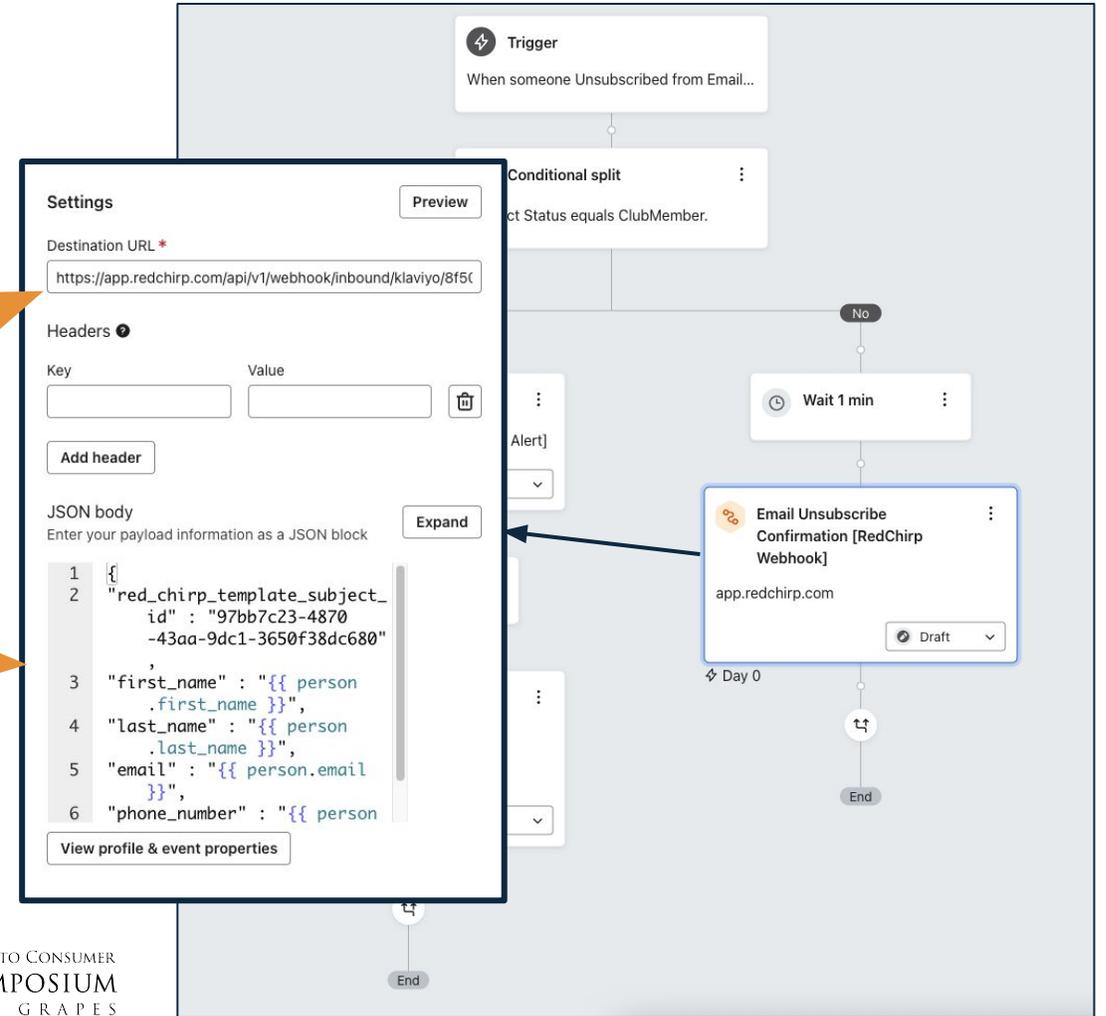
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Sending Restrictions

Attempt to exclude recipients without informational consent

Attempt to exclude recipients without promotional consent





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Message in a Bottle: Internal Alerts

Demo: Internal Alerts

What are Internal Alerts

Internal alerts are **automated email notifications** that go out to your **intern team members when a customer triggers a specific action** or reaches a certain point in a marketing flow.

Benefits of Internal Alerts

Some actions call for a human touch that no automated message can replicate, no matter the channel.

When someone cancels a club, makes a large purchase, or shows signs of disengagement, for example, even a personalized automated response may fall short. Internal alerts fill the gap by keeping your team informed and ready to respond with timely, personalized outreach when customers may need 1:1 attention.

Demo: Internal Alerts

1. Trigger: Metric > Active on Site

Trigger Filters: Page contains (*insert you URL*)

Profile Filters: (*insert your lists, properties, tags*)

2. Time Delay (*your choosing*)

3. Internal Alert (*make this short and action-focused*)

The screenshot displays the configuration interface for an internal alert. On the left, a flowchart shows the alert's logic: a 'Trigger' event 'When someone Active on Site' leads to a 'Wait 30 min' delay, followed by an 'Internal alert' action. The alert is currently in 'Draft' status. On the right, the 'Internal alert details' panel shows the email configuration. The 'Send to' field is set to 'wineclub@harneylane.com'. The 'From' field is 'Harney Lane Marketing Team' and the 'From / reply-to email' is 'info@harneylane.com'. The 'Subject' is 'Hot Lead Alert: Recent Wine Club Page Visito...'. Below this, a preview of the email content is shown, which includes a greeting, a statement about the contact's activity, and a list of contact details (first name, email, and phone number) represented by placeholder variables. A separate window in the foreground shows the rendered email content, with an arrow pointing from the preview in the interface to this window. The rendered email content is as follows:

Hello Membership Team,

The contact below just visited our Wine Club page on the website:

- {{ person.first_name }}
- {{ person.email }}
- {{ personlookup:"phone_number" }}

Since they were actively browsing the club info, this is a great opportunity to reach out while their interest is high. You might want to give them a call or send a quick text to see if they have any questions about membership or need help signing up.

Potential Internal Alert Triggers

When a **high-value product** is **added to cart**

When a **high-value purchase** is **made**

When a **VIP** **makes a reservation**

When a **VIP** **checks-in for reservation**

When a **new member** **joins**

When a **member** **reaches a milestone**

When a **staff member** **unsubscribes**

When a **member** **unsubscribes**

When a someone **completes a form**

When a **member** **is at-risk**

For a **member anniversary** or **birthday**

When a **customer** **becomes a frequent buyer**

When a **pick-up order** **is not collected**

When an **email** **is opened multiple times**



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Booty-Blasting Brain Break: Effective Email Capture or Annoying Pop-up





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Sharing the Spoils: Final Thoughts

Key Takeaways

Leverage the Pow-*arrrrrrrrrrr* of Automation

Let technology handle the heavy lifting—work smarter, not harder, or ye'll be swabbin' the deck forever!

Master the Fundamentals (No Leaky Ships)

Ye can't sail the seven seas until yer ship is seaworthy. Get yer design elements, naming conventions, and welcome flows in ship-shape order first.

Chart New Waters Monthly

Don't just stick to the same old map! Challenge yourself to build something new once a month to uncover hidden treasures.

Don't Set it & Sail Away

Climb aboard and check the maps —make sure the vintages be right, the events be on the horizon, and all messages match the season.





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Thank you + Q&A