



DIRECT TO CONSUMER WINE SYMPOSIUM

REQUEST FOR PROPOSAL: Direct to Consumer Wine Symposium 2025
Speakers for Workshop Sessions: Submissions Due September 20, 2024

The Direct-to-Consumer Wine Symposium Workshop Sessions aim to provide a practical counterpoint to the more blue-sky approach of the keynote sessions. They offer 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 2025 conference, we will be an all-in-person event in our new location, Monterey, CA! The venue is the Hyatt Regency Hotel in Monterey.

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 21-23, 2025, a \$795 value
- One night accommodation at the Hyatt Regency in Monterey, CA, a **\$210 value**, within the room block. *IMPORTANT: Speakers must reserve a room through the Steering Committee **by November 1st, 2024**, or risk providing 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 Thea Schlendorf, Executive Director of Free the Grapes. *Meals and other travel incidentals are not reimbursable.*

The above benefits are only offered to confirmed speakers who personally travel to and deliver their presentations at the 2025 Direct to Consumer Wine Symposium.

REQUIREMENTS FOR PROPOSAL

Due Friday, September 20, 2024: Proposal Submission Deadline

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!

Take-away tools. This is not a requirement, but preference will be given to speakers who have tangible action items and a take-away item from their talk.

A short biography. Prepare a biography of 200 words or less. This will allow us to get to know you better and understand how your experiences could add value to the DTCWS.

Friday, October 11, 2024: Speaker Notification Deadline

- The Workshop Committee will confirm speakers.
- Confirmed speakers must sign the Speaker Agreement and upload their bios/headshots to the event app -Whova.

Participation in two formal rehearsal sessions in November/December is mandatory. These meetings provide real presentation practice and create synergy among the group. Before these dates, your Workshop Session committee member will assist in preparation and casual practice sessions as needed. More sessions can be added, but these will be required at a minimum:

- Initial Topic Discussion Window: **October 28-November 15, 2024** (*Team rolls, topics, speaker headshots, and details due.*)
- Dress Rehearsal Window: **December 2-20, 2024.** (*Final PowerPoint and all visuals due.*)

WORKSHOP SESSIONS

With the move to Monterrey, we are expanding the Workshops from nine in 2024 to fifteen in 2025! Some pre-chosen Workshop Session topics are listed below. You are welcome to submit a proposal for more than one session or propose a session that is not listed below. The Workshop Sessions outlined below are suggestions on what our audience would be interested in, but not an exhaustive or final list. The Steering Committee may modify or cancel a workshop session during the planning period. Workshop topics and speakers will be confirmed in October.

QUESTIONS?

Please direct your inquiry to the contact provided below for the workshop(s) you are interested in. For general workshop committee inquiries, please contact susan@wineglassmarketing.com.

2025 TOPICS

WINE CLUB TOPICS

1. Wine Clubs and Luxury Brands: Experts Share Tips for Wine Clubs

Examine the best practices of luxury brands and their customers. This workshop will provide insights and practical tools for growing your wine club and increasing your retention.

Attendees will learn:

- How luxury brands create excitement and loyalty
- Ways to create an increased sense of luxury in the wine club
- What tactics should you try, and what should you stop doing now

Submissions and questions can be sent to James Lovaas at jameslovaas@gmail.com

2. Wine Subscription (Panel Discussion)

In recent years, an increasing number of wineries have been using the subscription model as an alternative to traditional wine clubs. In this session, a panel of wineries will share what they have learned so far.

Attendees will learn:

- How do subscriptions differ from traditional clubs
- What others have learned from the implementation of the subscription model
- How to maintain a successful wine club while also offering subscriptions

Submissions and questions can be sent to James Lovaas at jameslovaas@gmail.com

METRICS TOPICS

3. Understanding and Modeling Internal Data

Modern e-Commerce platforms and data analytic services can provide wineries with a plethora of data related to sales and customer service. The challenge is determining what data to collect and how to use it. Whether you're a seasoned DTC professional or just starting out, this workshop equips you with the tools and knowledge to use the data available to maximize sales and productivity.

Attendees will learn:

- What services are available for analyzing data
- How to use the data collected for planning and forecasting
- Pitfalls in data collection and how to avoid them

Submissions and questions can be sent to James Lovaas at jameslovaas@gmail.com

4. Creative Ways to Collect Useful Customer Data

In a competitive market where customers are looking for marketing that addresses their individual needs, accurate customer data is more important than ever. This session will examine creative methods of collecting customer data.

Attendees will learn:

- Methods for collecting data
- Ethics regarding collecting and using customer data
- Protecting your customer data

Submissions and questions can be sent to James Lovaas at jameslovaas@gmail.com

EVENT TOPICS

5. Events Designed for a Millennial Audience

As our customers' demographics change, events are evolving from high-cost, high-value to something more casual that Millennials respond to.

Attendees will learn:

- How are events changing to address Millennials and even Gen Z
- What role will events play in winery business
- How to measure the success of events

Submissions and questions can be sent to James Lovaas at jameslovaas@gmail.com

6. How to Sell Wine at Events: What Should Your ROI Be?

As events continue to evolve and potentially become more experiential, what role will wine sales play? This session will discuss methods for selling wine through experiences and events and set goals to ensure an adequate return on investment (ROI).

Attendees will learn:

- Sales techniques in the event setting
- How to set sales goals for the event channel
- How to get buy-in from your staff

Submissions and questions can be sent to James Lovaas at jameslovaas@gmail.com

EMAIL TOPICS

- 7. Email customer journeys and segments - take your programs to the next level.**

Unlock the full potential of your email marketing by diving deep into customer journeys and segmentation strategies. This seminar will provide you with actionable insights and advanced techniques to elevate your email campaigns and drive results.

Attendees will learn:

- How to design effective customer journeys that keep your audience engaged
- Techniques for segmenting your email list for maximum impact
- Best practices for integrating personalized content into your email campaigns
- Tools and strategies to automate and optimize your email workflows
- Case studies of successful email programs that leverage advanced segmentation

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

8. A panel discussing segmentation ideas that worked and didn't.

Join industry experts as they dive into real-world experiences with email segmentation—what worked, what didn't, and why. This panel discussion will give you an insider perspective on how to refine your segmentation strategies for better results.

Attendees will learn:

- Successful segmentation strategies and the key factors behind their success
- Common pitfalls in segmentation and how to avoid them
- The impact of different segmentation approaches on email performance
- How to test and iterate on your segmentation strategies
- Insights from industry leaders on the future of email segmentation

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

SOCIAL MEDIA TOPICS

9. Creating video content on a budget.

Discover how to create compelling video content for social media without breaking the bank. This seminar will teach you practical tips and tricks to produce professional-looking videos that capture attention and drive engagement.

Attendees will learn:

- Budget-friendly tools and equipment for video production
- Techniques for filming and editing videos using just your smartphone
- How to craft engaging stories that resonate with your audience
- Strategies to optimize videos for different social media platforms
- Tips for maximizing reach and engagement with minimal spend

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

10. Working with Influencers, or an Agent: How, Who, When and What to do.

Navigate the complex world of influencer marketing and agent partnerships with confidence. This seminar will guide you through the process of choosing the right partners, knowing when to engage them, and understanding the steps to make these collaborations successful.

Attendees will learn:

- How to identify the right influencers or agents for your brand
- Key factors to consider when deciding to work with an influencer versus an agent
- The best practices for initiating and managing these relationships
- When and how to measure the success of your influencer or agent partnership
- Common challenges and how to overcome them in influencer and agent collaborations

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

ADVERTISING TOPICS

11. Successful Meta and Google advertising strategies.

Master the art of digital advertising with proven strategies for Meta (formerly Facebook) and Google. This seminar will provide you with the latest insights and tactics to create powerful ad campaigns that deliver measurable results.

Attendees will learn:

- How to craft compelling ad creatives that stand out on Meta and Google platforms
- Techniques for targeting the right audience to maximize ROI
- Optimization tips for managing ad budgets effectively
- The importance of A/B testing and how to leverage data for better performance
- Real-life examples of successful campaigns and key takeaways

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

12. Podcasts and broadcasts - take your ads to a very targeted next level.

Unlock the power of podcasts and streaming music services to reach a highly targeted audience. This seminar will explore how to create and place ads that resonate with listeners and drive engagement in these fast-growing digital spaces.

Attendees will learn:

- The advantages of advertising on podcasts and streaming platforms
- How to identify and reach niche audiences through audio advertising
- Strategies for crafting ads that blend seamlessly with podcast and music content
- Best practices for measuring the success of your audio campaigns
- Case studies of brands that have effectively used audio ads to grow their audience

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

DIVERSITY TOPICS

13. Ensure *everyone* hears your message: a panel to discuss reaching neurodivergent, translation, context, ADA, and generational groups.

Learn tangible tips to ensure your message reaches and resonates with everyone, regardless of neurodiversity, language, accessibility, or generational differences. This seminar includes a panel of experts who will discuss inclusive communication strategies that amplify your impact.

Attendees will learn:

- Practical techniques to tailor your communication for diverse audiences
- How to adapt your messaging to be inclusive of neurodivergent individuals
- Best practices for translating content while maintaining context and meaning
- Strategies for ensuring ADA compliance and accessibility in all your communications
- Insights on how different generational groups perceive and engage with messaging

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

14. What does diversity look like in marketing?

Explore what true diversity in marketing looks like beyond just representation in photoshoots. This seminar will explore how diversity can and should be reflected in every aspect of your marketing strategy, from messaging to customer experience.

Attendees will learn:

- How to integrate diversity into your marketing strategy authentically
- The importance of inclusive messaging and language in reaching diverse audiences
- Ways to ensure your campaigns reflect a broad spectrum of perspectives and experiences
- How to move beyond tokenism and foster genuine connections with diverse communities
- Case studies of brands that have successfully embedded diversity into their marketing efforts

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

MARKETING STRATEGY TOPICS

15. The marketing funnel – what is it and how to use it.

Unlock the secrets of your marketing funnel and learn how to accurately gauge your progress while setting clear, actionable goals and KPIs. This seminar will guide you through identifying your current stage in the funnel and refining your strategy to drive better results.

Attendees will learn:

- How to map out your marketing funnel and identify where you are in the journey
- Techniques for setting realistic and measurable goals aligned with your funnel stages
- Key performance indicators (KPIs) to track and assess the effectiveness of your funnel
- Strategies for optimizing each stage of the funnel to improve conversion rates
- Practical tips for adjusting marketing tactics based on funnel insights and performance data

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

16. How to maximize your budget.

Discover how to make every dollar count with strategies to maximize your marketing budget and achieve exceptional ROI. This seminar provides actionable insights and tools to optimize your spending and ensure your marketing dollars work as hard as you are.

Attendees will learn:

- Methods for assessing and allocating your marketing budget effectively
- Techniques for prioritizing high-impact channels and activities
- Strategies for measuring and analyzing the return on investment (ROI) of your marketing efforts
- Tips for leveraging data and analytics to make informed budgeting decisions
- Best practices for adjusting your budget based on performance and changing market conditions

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

TECHNOLOGY TOPICS

17. What AI programs work best for data analysis.

Dive into the world of AI-driven data analysis, focusing on the most effective programs and their real-world applications. This seminar will showcase leading AI tools and provide hands-on demonstrations to help you harness the power of artificial intelligence for insightful data analysis.

Attendees will learn:

- How to map out your marketing funnel and identify where you are in the journey
- Techniques for setting realistic and measurable goals aligned with your funnel stages
- Key performance indicators (KPIs) to track and assess the effectiveness of your funnel
- Strategies for optimizing each stage of the funnel to improve conversion rates
- Practical tips for adjusting your marketing tactics based on funnel insights and performance data

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

18. Understanding Google Analytics.

Get to grips with Google Analytics 4 (GA4) and learn how to generate and interpret basic reports that drive actionable insights. This seminar will guide you through the essential features of GA4, equipping you with the skills to effectively monitor and analyze your website's performance.

Attendees will learn:

- Introduction to the GA4 interface and its key features
- How to set up and customize basic reports to track user behavior and site performance

- Techniques for interpreting GA4 data to understand user engagement and conversion paths
- Strategies for utilizing GA4's event tracking to gain deeper insights into user interactions
- Tips for leveraging GA4 reports to make data-driven decisions and improve your digital marketing efforts

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

HR TOPICS

19. Employee Development: HR Retention and Growth

Investing in retention and growth is essential for building a positive company culture, fostering innovation, and driving long-term success by nurturing the potential within every employee. The goal of this workshop is to provide valuable insights, practical tools, and actionable strategies that you can use to enhance employee retention, growth, and development through continuous education and local partnerships.

Attendees will learn:

- Innovative approaches to education and training within organizations
- Strategies and examples of collaborations with local resources such as educational institutions, business partners, and community organizations, as well as how to find/nurture these partnerships
- Best practices for employee retention and happiness. Understanding the employee's needs

Submissions and questions can be sent to Kasey Helt at kasey@coewine.com

20. Employee Development: HR Cross Training to Create a Diverse Team

Cross-training is vital for small wineries to cultivate a versatile team, enhance operational efficiency, and ensure long-term success by empowering employees to develop a broad range of skills. This panel discussion will focus on strategies for small wineries to create a versatile and skilled team capable of handling various roles within the winery.

Attendees will learn:

- Insights into effective cross-training practices that have been successfully implemented in small wineries
- Real-world examples of how cross-training has positively impacted winery operations, including productivity and team cohesion
- Common challenges small wineries face when implementing cross-training and how to address these issues

Submissions and questions can be sent to Kasey Helt at kasey@coewine.com

21. Employee Development: What roles can future-proof your company?

From wine club managers to tasting room attendants, who is the next team member your winery needs? In this workshop, we will hear from experienced managers as we explore the roles needed for your winery's future success. We will identify emerging roles and key competencies needed to ensure businesses remain competitive in the rapidly changing wine industry landscape.

Attendees will learn:

- Emerging roles are becoming increasingly important, including roles focused on technology, sustainability, and the customer experience
- Case studies and success stories from companies that have identified creative roles and metrics showing success
- Ways to attract new talent from other markets to create a forward-thinking company

Submissions and questions can be sent to Kasey Helt at kasey@coewine.com

BRANDING TOPICS

22. Branding/Storytelling: How to identify and create your brand story

In the ever-evolving wine industry, how do you get your story heard and create a compelling narrative that communicates your mission, evokes emotion, and builds customer's trust? In this workshop, branding and storytelling experts will give you the tools needed to craft a unique brand narrative that will build lasting customer loyalty.

Attendees will learn:

- Tools to identify your company's core message to appeal to your target market
- Actionable strategies for translating the brand story into visual identity, social media strategies, and customer experiences

Submissions and questions can be sent to Kasey Helt at kasey@coewine.com

23. Branding/Storytelling: Inspirational Case Studies

This lively panel of expert storytellers will focus on sharing case studies and success stories that demonstrate how effective storytelling and branding have been pivotal to the success of their companies. The goal is to provide actionable insights and inspiration for businesses looking to harness the power of storytelling to enhance their brand and drive growth.

Attendees will learn:

- How to select specific strategies and tactics, including crafting a compelling brand narrative, identifying and communicating brand values, and building emotional connections with customers
- First-hand accounts of how storytelling and branding can transform business and lead to measurable success

Submissions and questions can be sent to Kasey Helt at kasey@coewine.com

LUXURY MARKETING TOPICS

24. Creating a Luxury Brand for Multiple Generations

This workshop will provide the necessary tools to plan, prioritize, market, and evolve an existing luxury brand to appeal to current and future consumers from multiple generations.

Attendees will learn:

- Steps to understand who and how to segment/target
- How to provide simple tools and manageable tasks to effectively market the brand as it relates to trends and expectations of a specific generation
- To define & construct new strategies to provide memorable connections/experiences that align with generational consumers' wants and needs. (I.E. Tangible vs. Virtual experiences)

Submissions and questions can be sent to Sara Sindicich at s.sindicich@danzadelsolwinery.com

25. The New Luxury Narrative: What does “Luxury” mean to Generation Z

This workshop describes the ever-changing perception of luxury brands and products in the DTC market, emphasizing Generation Z's expectations and buying power.

Attendees will learn:

- To clearly define the desires and demands of Generation Z's behavior in the Luxury market today
- How Generation Z is driving and changing the Luxury market to gear toward experiences over products

Submissions and questions can be sent to Sara Sindicich at s.sindicich@danzadelsolwinery.com

26. Accommodating the Modern Guest: How Much is Too Much?

As tasting room visitation and wine club retention continue to show a slow and steady decline, how much “give” should tasting rooms and wineries allow to accommodate modern guests and wine club members? This panel will discuss how to navigate some hot-button topics that remain controversial.

Potential Topics for discussion below. Please include successful and unsuccessful examples and practices:

- Policies on bringing children; pros/cons
- Policies related to dogs; pros/cons
- Hosted, seated experiences vs casual bar tastings
- Reservations vs Non
- Outside food & picnics
- Offering non-alcoholic beverages OR low-alcoholic beverages
- Free Shipping vs Flat rate shipping

Submissions and questions can be sent to Sara Sindicich at s.sindicich@danzadelsolwinery.com

27. The Future of DTC: The Shift from Product to Experiences

Understand and navigate the changing DTC landscape of Millennial and Generation Z consumer buying practices through experiences & events using proven strategies and tactics that will capture, engage, and retain their loyalties. This workshop will empower marketing teams with tools to focus on the shift from product to memorable moments.

Attendees will learn:

- How to identify & define what motivates Millennials and Gen-Z to spend \$\$\$ and how this relates to experiences
- How to craft an effective marketing strategy that appeals to the younger generation's preference for Instagrammable and memorable moments
 - Email
 - Text
 - Social Engagement
 - Snail Mail
- Tactics to upgrade and refresh existing experiences

Submissions and questions can be sent to Sara Sindicich at s.sindicich@danzadelsolwinery.com

28. Format Exploration: Changes to the Tasting Room Experience

Should tasting rooms consider making more permanent changes to the way they serve their customers in a post-COVID market? In this workshop or panel discussion, guests will learn the benefits of multiple tasting options based on consumer insights.

Attendees will learn:

- Data that shows the recent change between formal reservation experience vs casual bar service
- A discussion of different types of services with pros and cons and costs and profits
- The advantages of offering pre-paid service vs on-site payment
- What customers are attracted to formal or casual experiences
- Experimental strategies with examples of success and challenges

Submissions and questions can be sent to Sara Sindicich at s.sindicich@danzadelsolwinery.com