



From Data Chaos to Clarity: A Practical Roadmap for Winery Growth.

Our purpose: Help others thrive

Our values:



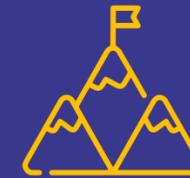
Respect &
Connect



Servant's
Heart



Value
Value



Progress Over
Comfort



DIRECT TO CONSUMER
WINE SYMPOSIUM
FREE THE GRAPES



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DTC – Common Issues

- Where is my inventory?
- How much do I really have on hand?
- Overstocking
- Production and packaging shortages
- Poor demand forecasting
- Inaccurate reporting
- Supply chain disruptions
- Logistical challenges
- Missing or incomplete customer data

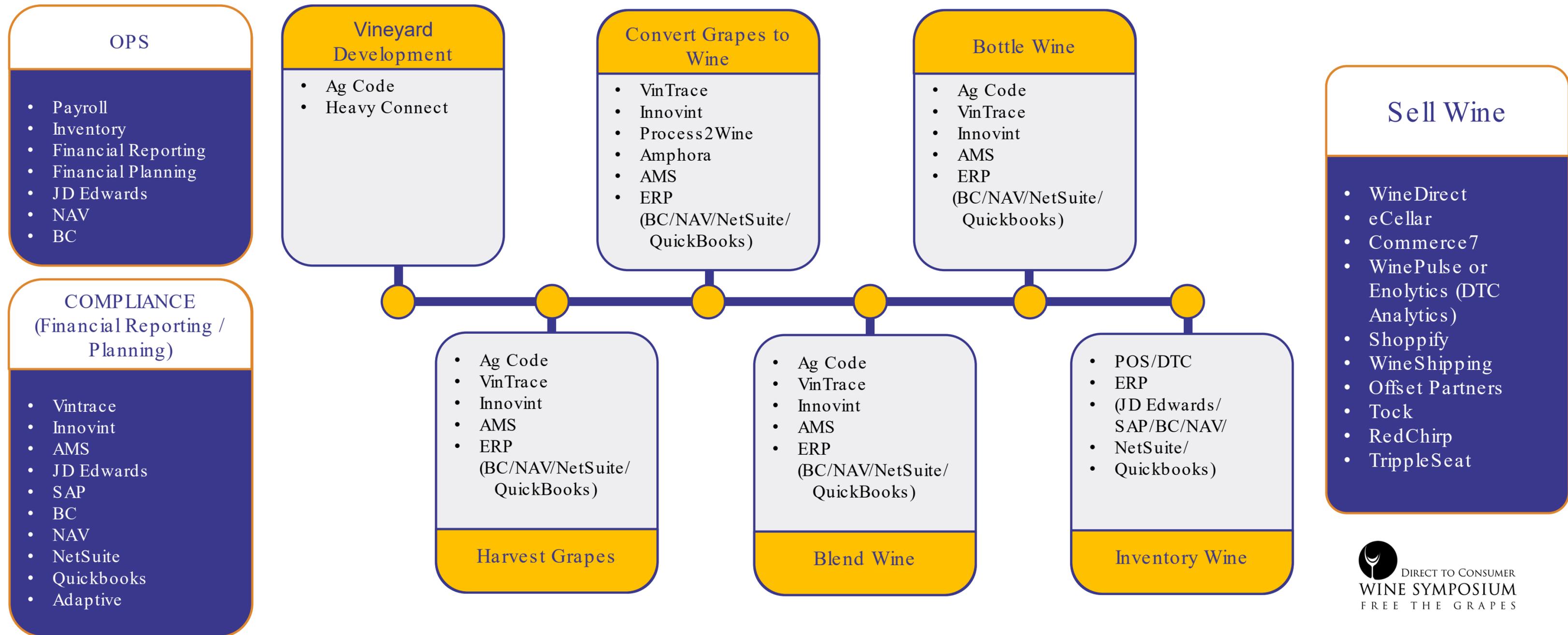


Multiple Disparate Systems Across the Value Chain

- **Lack of insight** for decision makers. Conflicting or incomplete data
- **Financial data visibility** is a business-wide issue. More non-financial operators need access to make decisions
- Manual processes are **costly**. Consuming valuable resources from other value-add work
- ❑ **Time delays** and **higher margin for error**
- **Repetitive Tasks** - Manual approvals (Timesheets & PTO), Alerts and manual intervention



A typical winery's technology stack, from Grape to Glass



Meet Veritas Winery

- Veritas is a 35000-case winery with tasting room, wine club, and wholesale / DTC channels

- Their tech stack includes:

- Commerce 7

- QuickBooks Online

- Tock

- Monday

- RedChirp

- Trippleseat

- WinePulse

- Microsoft 365

- AgCode

Commerce 



INTUIT
quickbooks

AgCode

 tock

red chirp

 monday.com

 trippleseat
restaurants



Veritas has real challenges

- Inventory counts often don't match between DTC front end, warehouse, and accounting
- Refunds and allocations delayed due to mismatched customer data
- Marketing segmentation limited by inconsistent contact records
- Wine club shipments and billing errors caused by outdated syncs
- Manual reporting across systems that's slow, error -prone, and inconsistent
- Finance and operations making decisions on conflicting data
- Customer service teams wasting hours reconciling "who bought what"
- No unified view of sales, club, and complex inventory performance in near real -time

Veritas's Ideal State

❑ Unified and near real-time data

- Integrated systems
- A "single source of truth"
- Advanced analytics across value chains

❑ Optimized inventory and stock management/visibility

- Near real-time visibility
- Demand forecasting
- Efficient fulfillment visibility

❑ Proactive and personalized customer engagement

- Enhanced personalization
- Automated communication
- Seamless online experience

❑ Streamlined and automated compliance

- Stress-free reporting
- Reduced risk

❑ Scalable operations

- Adaptability – quickly moving with changing conditions
- Long-term growth – moving from reactivity to proactive campaigns and genuine customer loyalty

The path forward →



Crawl: Visibility

See what's really
happening beneath the
surface.



Walk: Connected Data (Integration)

Get your data moving
in the same direction



Run: Intelligence in Action

Let your data start
working for you

Crawl



PROMISE

We're not changing platforms, we're connecting them



Solution: Data Visibility (Single Pane of Glass)



Cross-Platform Reporting with Power BI

Making the Data Connection

Power BI Desktop

- Establish Data Connections
- Transform/clean up/normalize data
- Model & Relate data across sources
- Build standard calculations representing organizational KPI's and metrics
- Represent these metrics and other near real-time data needs in visuals and reports

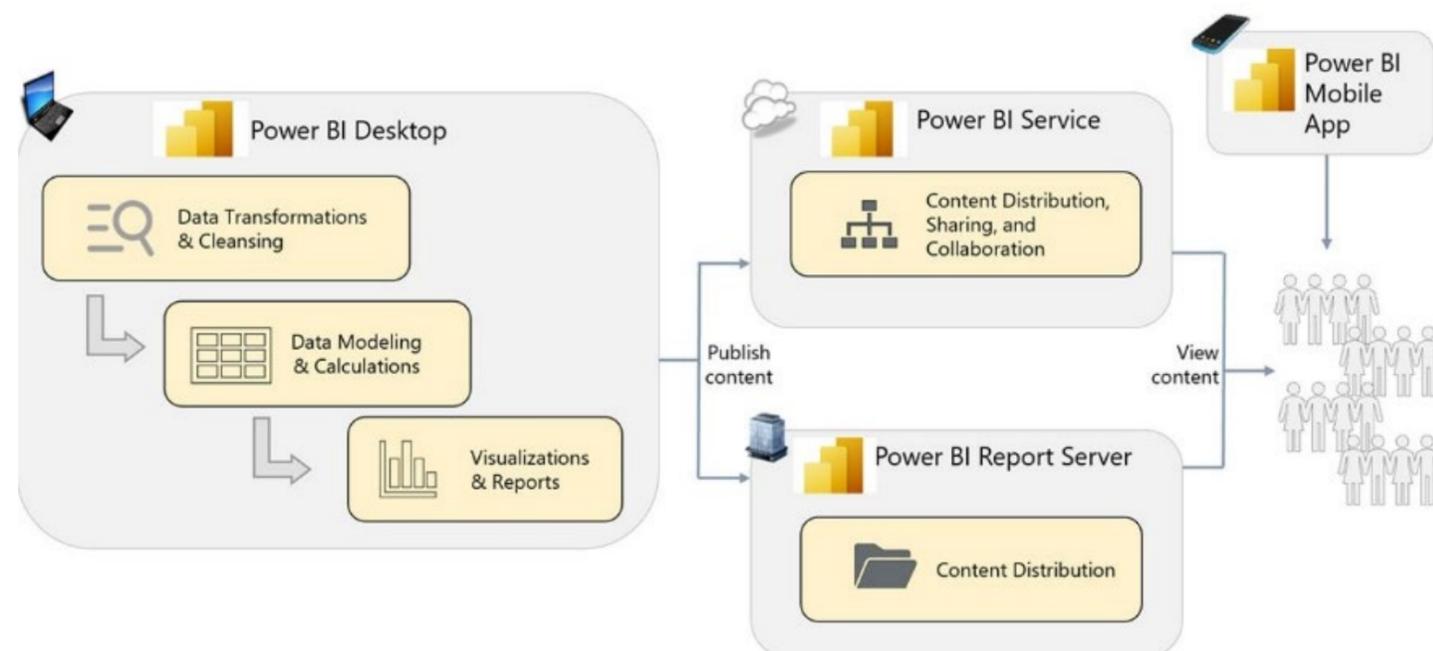
Power BI Service

- Single Source of Shared Truth
- Row-Level Security by Role
- Targeted Reports, and Dashboards
- Content Distribution and Collaboration



Power BI integrates data across platforms, creating a comprehensive, real-time view across your entire organization, enhancing decision-making and operational efficiency.

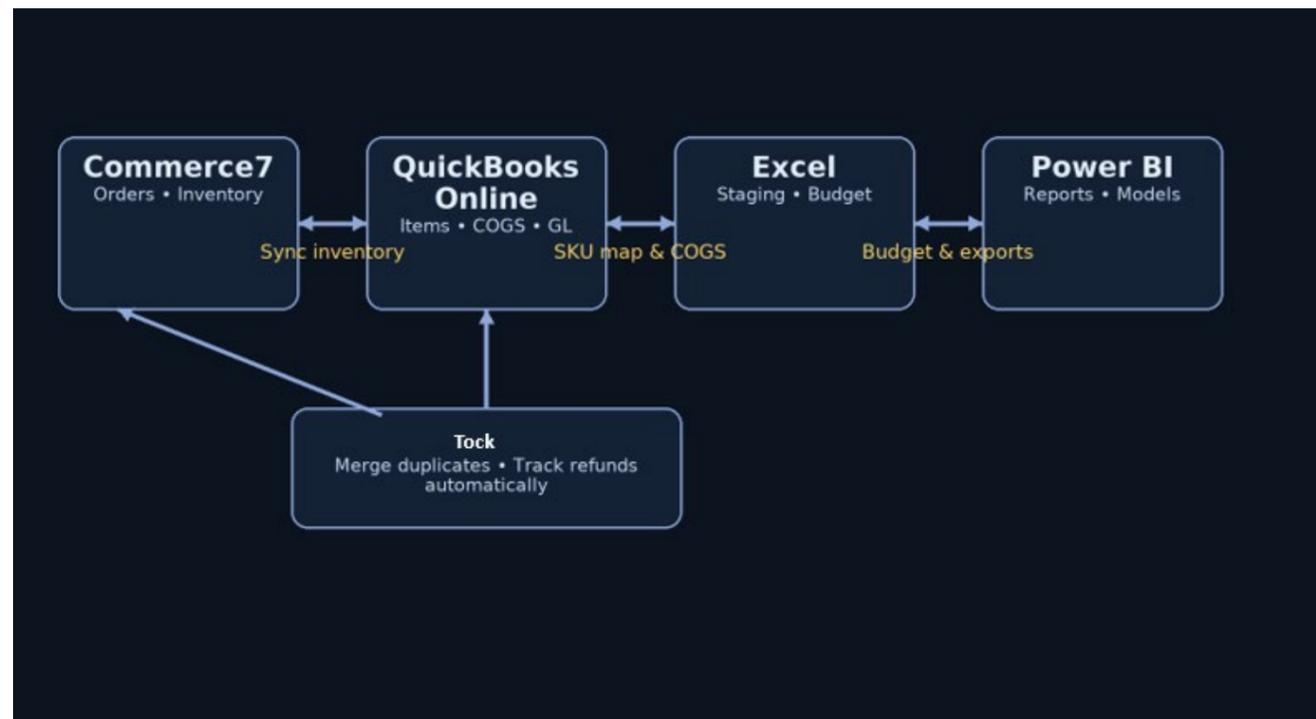
The Power BI Service allows for collaboration and sharing of data securely, giving authorized stakeholders access to *just* the information they need, when they need it.



Before & After: Spreadsheet Chaos to Aligned Organizational Metrics



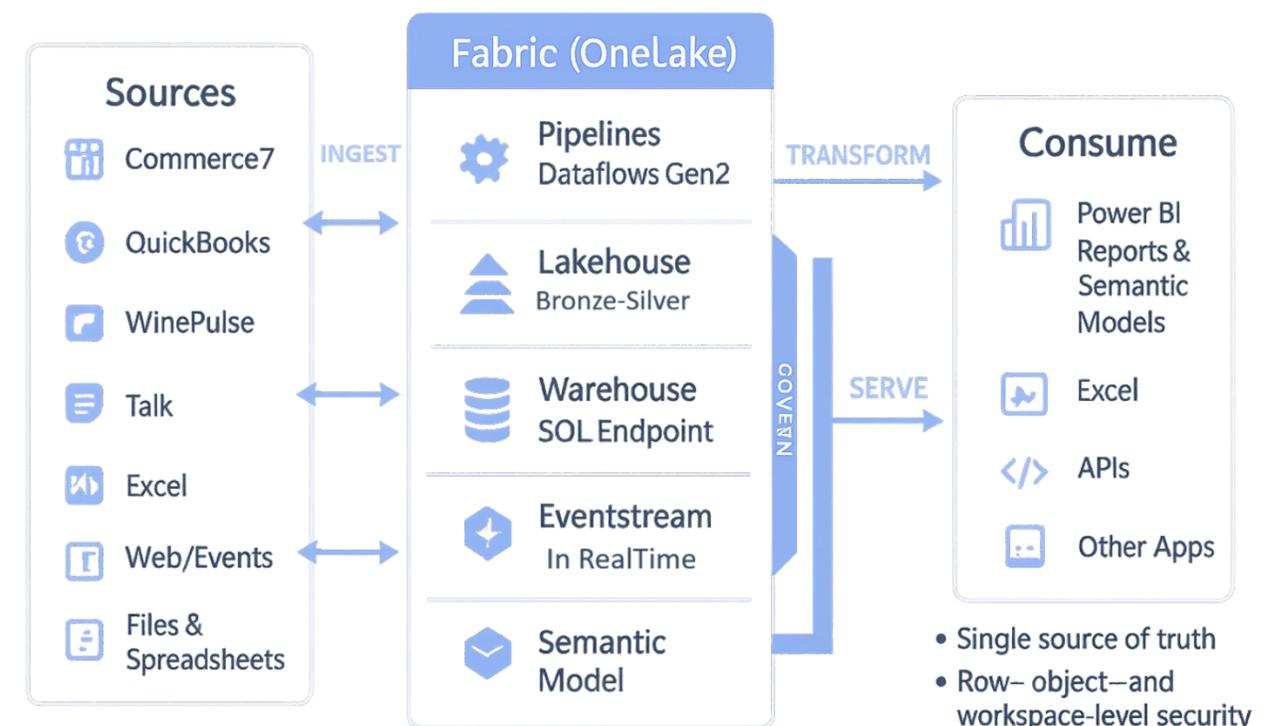
Solution: Automate Data Integration Processes



- Reduce Errors
- Remove Inconsistencies
- Shorten Wait Times
- Scalable
- Related Data, when you need it, where you need it

Centralized Repository - Fabric

Making the Data Connection



Built on Microsoft Fabric—governed in OneLake

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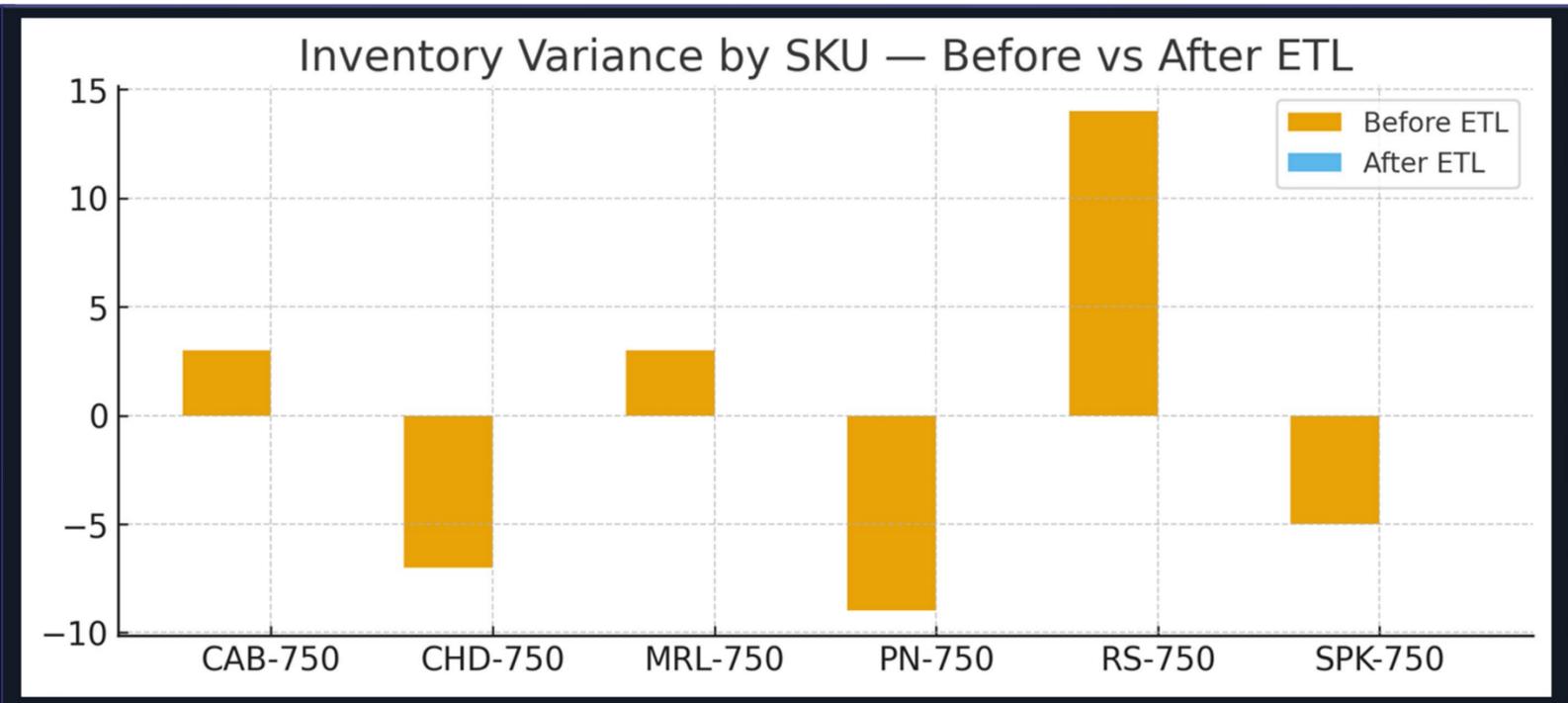


Power BI Dashboard (Veritas)



Reconciliation — Inventory Variances (Caught Automatically)

SKU	Location	C7	QBO	Variance	Flag
MRL-750	Tasting Room	179	171	-8	ALERT
MRL-750	Distributor	138	146	8	ALERT
CHD-750	Tasting Room	199	192	-7	ALERT
RS-750	Warehouse	269	276	7	ALERT
SPK-750	Warehouse	104	98	-6	ALERT
RS-750	Distributor	64	70	6	ALERT
CAB-750	Tasting Room	152	158	6	ALERT
PN-750	Distributor	153	147	-6	ALERT
PN-750	Warehouse	252	247	-5	ALERT
CHD-750	Warehouse	137	140	3	ALERT



Don't Run a Marathon Without Doing the Hard Work

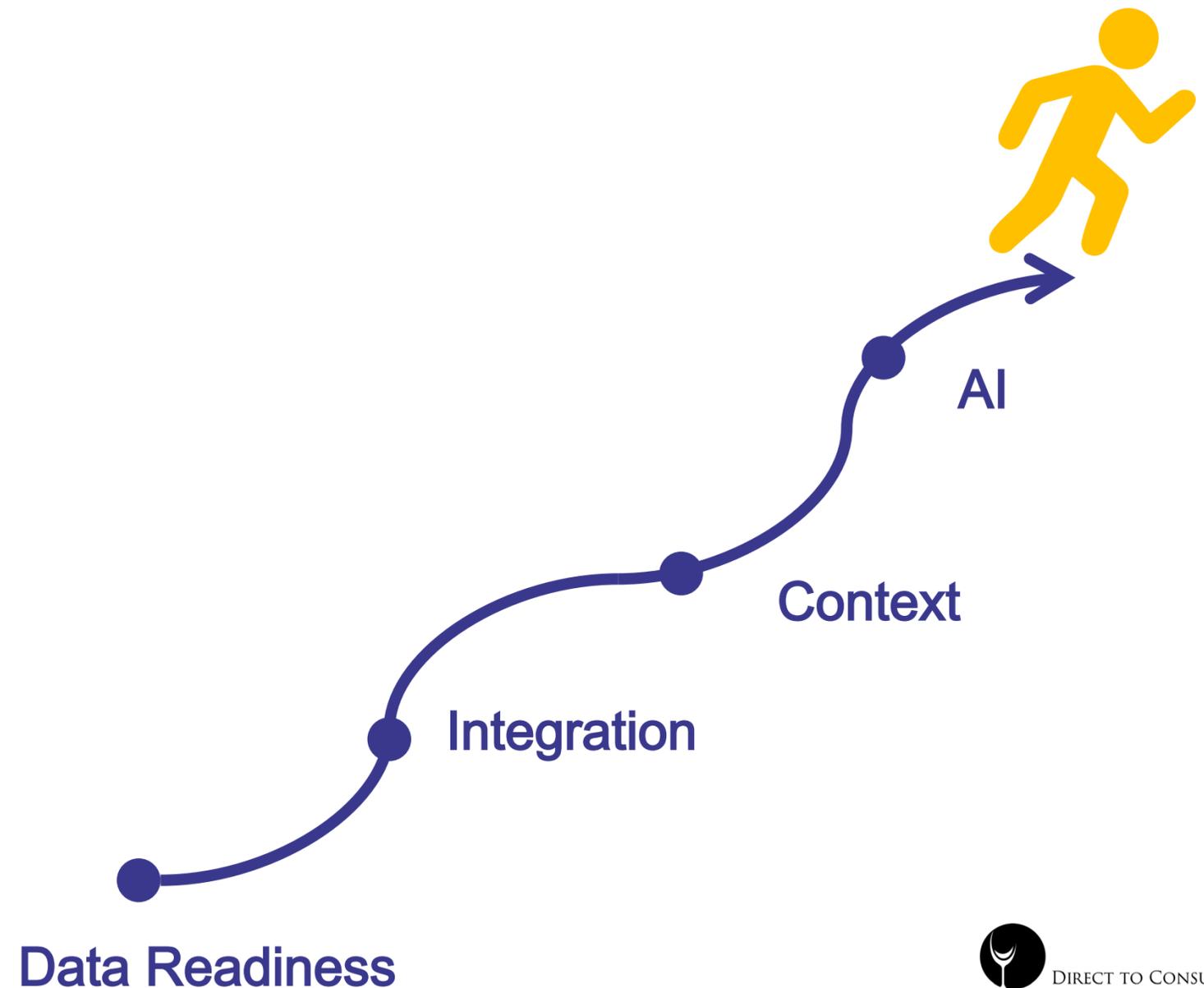


AI can be transformational, but only if you've done the prep.

Before we sprint into AI, we have to train:

- Build the foundation with clean, connected data
- Do the heavy lifting of integration
- Create usable, rich context for every interaction

That groundwork turns AI from a novelty into a driver of personalization, efficiency, and growth.

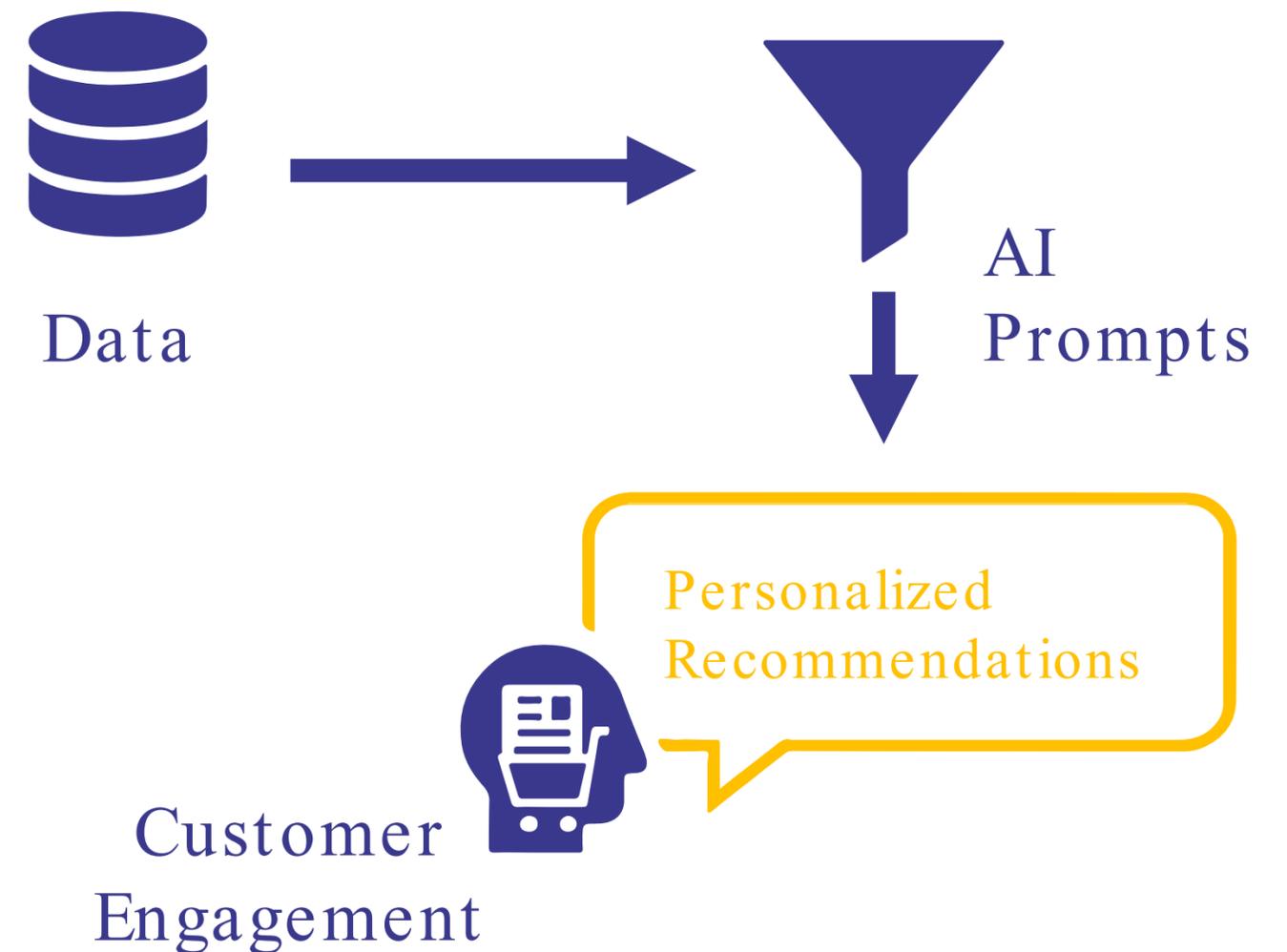


How It Comes to Life: Veritas Winery



With clean data and connected systems, AI helps Veritas:

- Personalize tasting invites based on guest behavior and history
 - Spot club members at risk of leaving and prompt re-engagement
 - Forecast tasting-room traffic and online demand
 - Keep every message in the same brand voice
- AI becomes a digital concierge, amplifying hospitality through data.

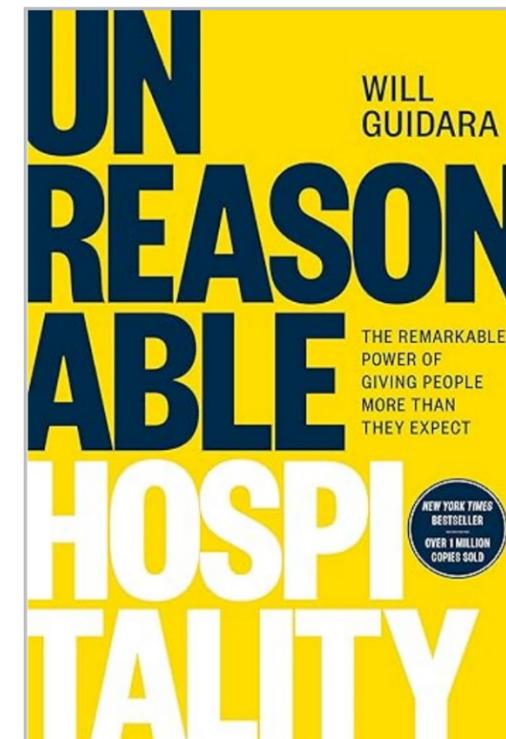


The Real - World Shift: Everyday Workflows with AI



F unction	Before AI	With AI
✉ Invite Campaigns	Staff exports lists and filters who to invite	AI segments guests by spend, recency, and preferences, then drafts personalized invites
📅 Tasting Room Scheduling	Guest submits form, waits for reply	AI concierge books tastings instantly and suggests pairings or add-ons
❤️ Club Member Retention	Team reviews churn manually	AI flags at-risk members and suggests personalized re-engagement offers
🍷 Product Recommendations	Generic newsletter to all customers	AI tailors picks to individual taste profiles (“If you liked X, try Y”)
📦 Inventory Planning	Spreadsheets and guesswork for demand	AI forecasts demand based on sales trends and behavior
💬 Website Chat & Support	Staff answers all inquiries manually	AI handles common questions and routes only complex issues to staff

Hospitality, Amplified by AI



“AI doesn’t replace people, it gives us back the time to be unforgettable.
Unforgettable experiences come from small, personal touches.”

Endsight Client: Winery Overview & Challenges

❑ Winery Profile

- 165,000 9L case winery with domestic & international distribution
- 5 retail tasting room locations
- 50/50 split between Direct -to-Consumer and Wholesale

❑ Key Challenges

- Inventory spread across 5 outsourced warehouses + retail rooms
- No visibility into SKU-level availability for the sales team
- Excess inventory (5 years), cash flow strain, mismatched supply/demand
- Data fragmented across 4 systems (bulk, finished goods, international production)
- 2–3 headcount needed to manually produce outdated inventory reports

Solution & Business Impact

❑ Solution

- Automated daily data pulls into Power BI from all systems
- Centralized dashboard with real-time SKU visibility
- Sales team aligned on one version of the truth

❑ Business Impact

- \$8M cash flow unlocked through balanced inventory
- Repurposed \$650k/year in headcount costs

Vision of the future

- Unified systems create real-time visibility across every department
- Automated workflows free people from repetitive tasks
- A.I. transforms data into meaningful, actionable insights
- Predictive analytics guide smarter decisions — not just faster ones
- Every employee, from tasting room to finance, has the data they need
- Technology becomes a growth partner, not a maintenance burden

The Journey (Next Steps)

We're here to help you start this journey. Set up a meeting with us to explore how we can help you integrate your systems, automate your data processes and leverage A.I. intelligence



Call – High level discussion of your challenges.

- We can schedule that today!



Planning Session

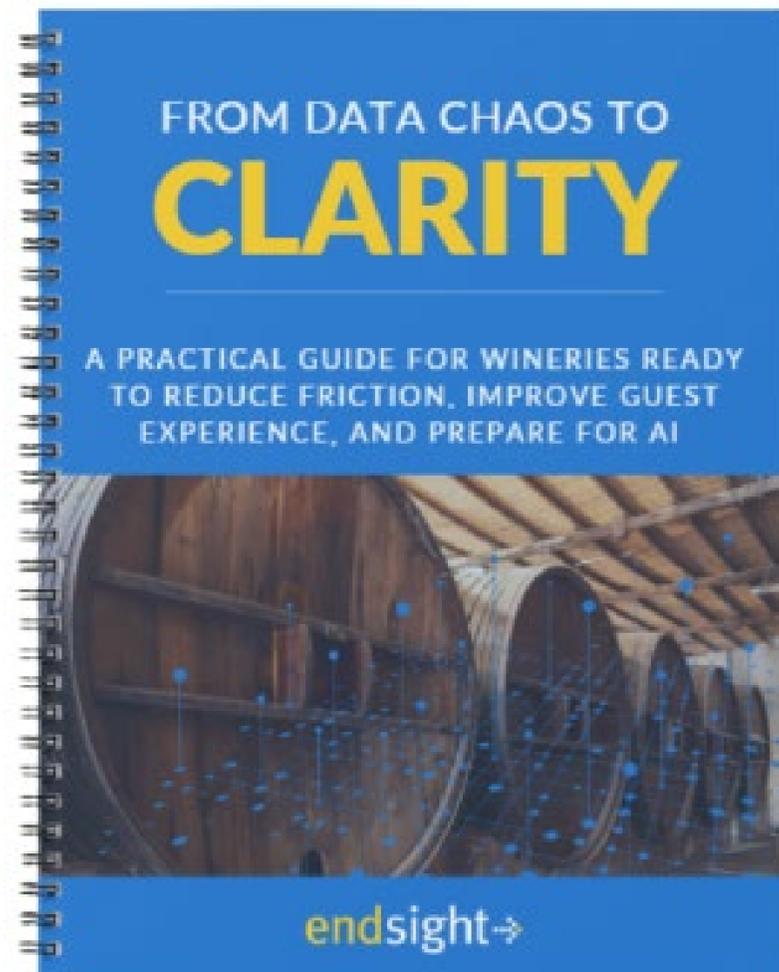
- We will work with you to prioritize the key areas to focus on.



Project, Paid Engagement

- Discovery, Process Documentation, Alignment of Expectations
- Build, test and validate

Meet with Endsight!



- ☐ **Booth: Conference Center Foyer**
 - Pickup a free guide!

☐ **Learn more at:** <https://www.endsight.net/wine>





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Q&A

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