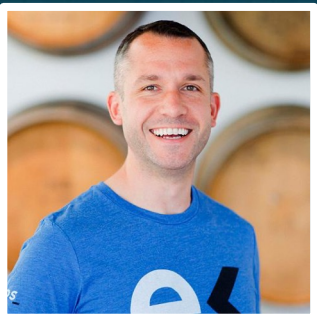


Track: Sales / Marketing  
9:30am - 10:30am

Conference Track  
Presented by:



**Connor Clarkes**  
Account Executive /  
Commerce7



**Josh McKinney**  
CEO / Ekos



**Maria Pearman**  
Principal / GHJ Advisors



# *Josh McKinney*

CEO OF EKOS

- Co-founded Ekos in 2014
- Passionate about helping wineries and breweries run their businesses better

ABOUT EKOS

- Business management software for alcohol businesses
- Core capabilities: inventory, production, sales, accounting & reporting



# *Maria Pearman*

PRINCIPAL AT GHJ ADVISORS

- Leads the Beverages practice at GHJ, a Los Angeles-based accounting firm
- 15 years of public accounting experience, specializing in beverage alcohol companies

ABOUT GHJ ADVISORS

- Providers of accounting, tax and advisory needs
- Works with hundreds of breweries, distilleries, wineries and other companies in the beverage alcohol space



# *Connor Clarkes*

ACCOUNT EXECUTIVE AT COMMERCE7

- Joined Commerce7 in 2021
- Experienced at helping wineries find the software solutions for their businesses

## ABOUT COMMERCE7

- A modern DTC platform for wineries
- Provide POS, ecommerce, club, CRM and reservations software

# Running a business has gotten harder

➤ Supply chain challenges

➤ Rising prices & inflation

➤ Changing consumer expectations

➤ Unpredictable economy



Squeezed margins



Accurate forecasting



Business visibility



Brand differentiation





# INVENTORY MANAGEMENT

*more than*

**40%**

of wineries use  
spreadsheets for  
inventory management

Source: Ekos 2022 State of Technology Report



# Spreadsheets Galore!

---



## production & dry goods

**40%** spreadsheets

**13%** no system

**7%** homegrown



## case goods inventory

**45%** spreadsheets

**11%** no system

**5%** QuickBooks

Source: Ekos 2022 State of Technology Report



D T C S A L E S

Purchase preference is driven by customer experience.

*The decision to purchase through a specific channel is driven by customer experience.*

*nearly*

**50%**

of wineries don't have  
anyone looking at  
consumer data

Source: SVB 2021 Report

# 5.9x

higher conversion rate for  
wineries using  
personalization

Source: Commerce7

# Modern Club Impact

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- 19.5% of members sign up online on Commerce7
- Marginal positive impact on churn when allowing cancel/skips online
- Dramatic positive impact on NPS when allowing canceling online
- 63% increase in club LTV for members who edit

DTC software alone is not enough...



Be 25% more efficient with integrations

# Thank you!

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[connor@commerce7.com](mailto:connor@commerce7.com)



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