

Track: Sales / Marketing
1:00pm - 2:00pm

Conference Track
Presented by:


MODERATOR



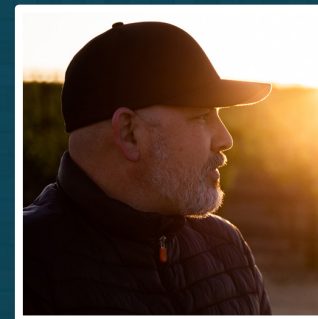
Susan DeMatei
President / WineGlass
Marketing



Jennie Gilbert
Founder / Red Chirp



Andrea Myers
Director of DTC Sales &
Marketing / Round Pond
Estate

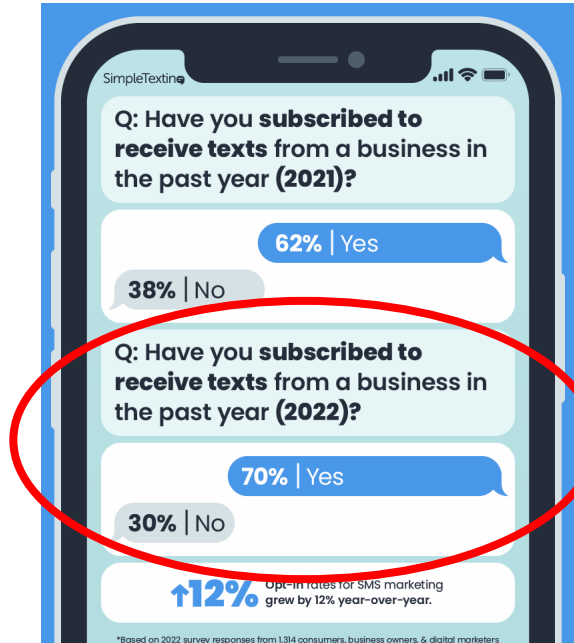


Adam Ryan
Director of Sales &
Marketing /
Coursey Graves Winery

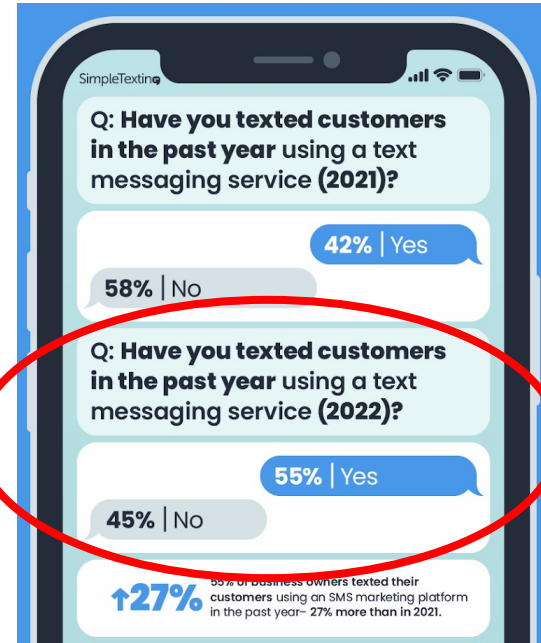


Bryan St. Amant
Founder & CEO /
VinterActive

Text Marketing is Already Proven



Consumer Adoption



Business Adoption

In 2022, most U.S. consumers and businesses have already adopted text marketing

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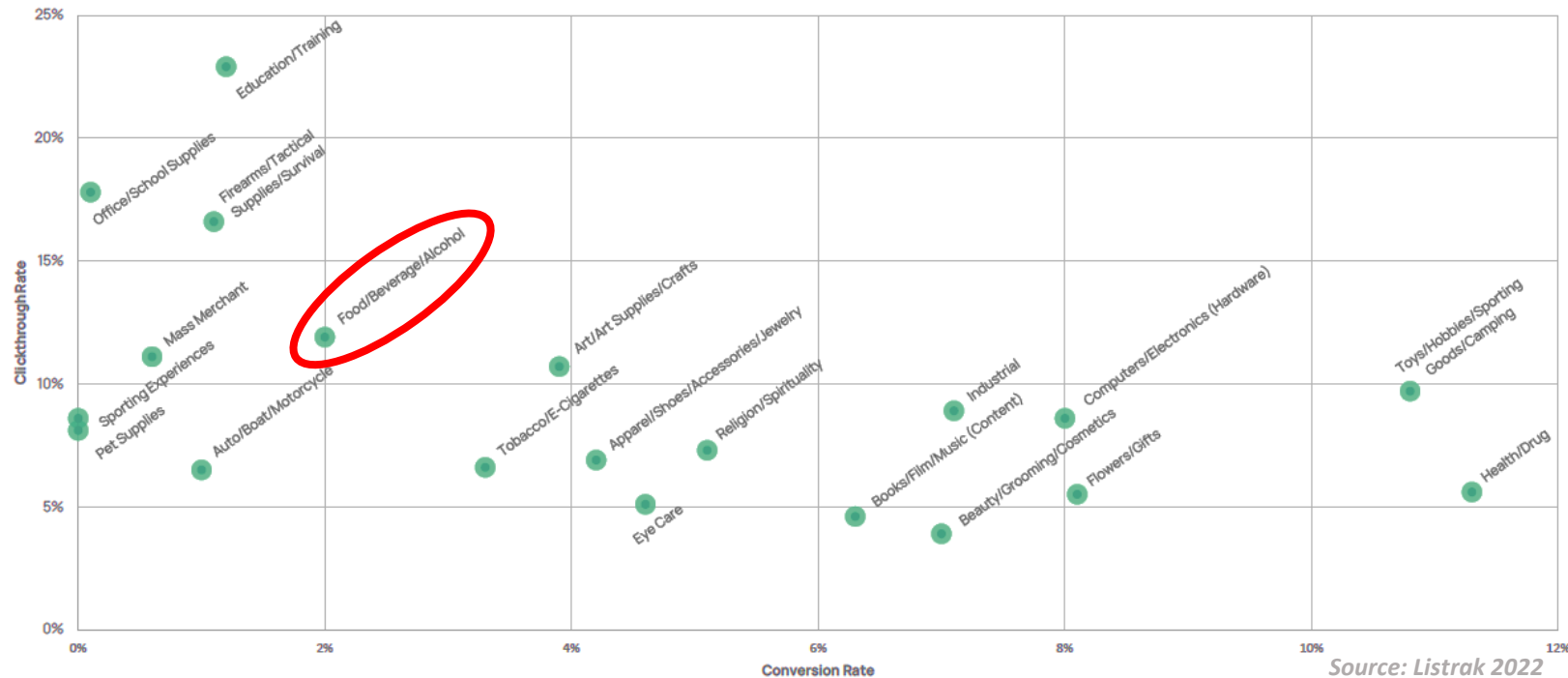
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It Works Across All Industries

Conversion vs Click-Through Rate by Industry



Food/bev/alcohol brands reported a 12% CTR and 2% sales conversion for each text message sent in 2021

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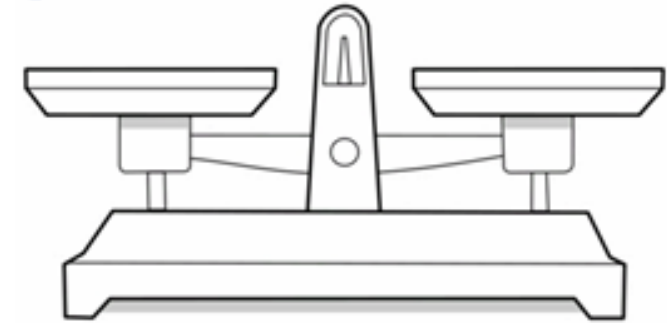
Drives DTC Wine Marketing Results

SMS Marketing Performance in the U.S. Wine Industry - 2022

| Marketing Metric | Email Marketing | SMS Marketing | SMS Advantage |
|---------------------|-----------------|---------------|---------------|
| Open Rate | 23% | 98% | 4.3X |
| Click-thru Rate | 1.7% | 12% | 7.4X |
| Consumer Engagement | 0.38% | 12% | 32X |

Source: VinQuest 2022

300 SMS
Subscribers = 10,000 Email
Addresses



*32-times better results than
email marketing*

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Generates Real-World Business Benefits

- ❖ 99% message delivery rate
- ❖ 10% average click-thru rate
- ❖ \$1.07 average revenue/text sent
- ❖ \$0.03 cost/text sent
- ❖ 3567% return on marketing spend
- ❖ **Additional Benefits Reported**
 - Better customer service
 - Increased consumer engagement



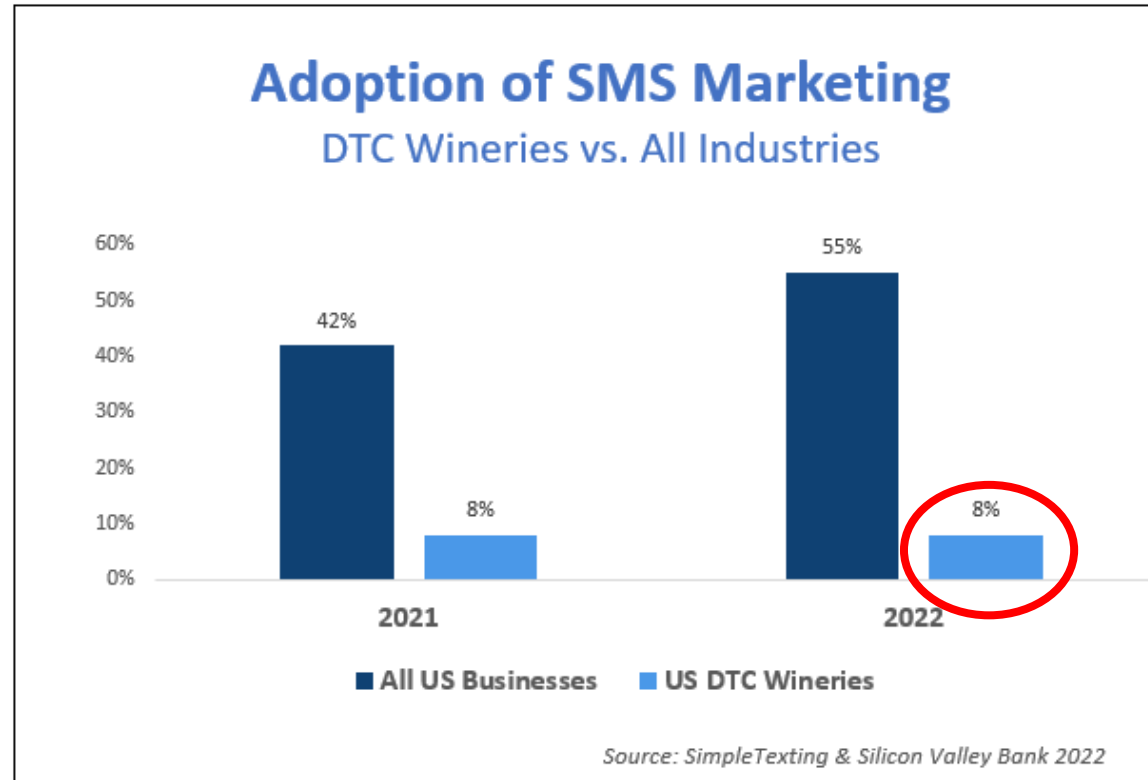
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Most Wineries Are Still Missing the Boat



**Creating a
Once-in-a-Generation
Opportunity**

*Early adopters of SMS
wine marketing will enjoy
a unique competitive
advantage in 2023*

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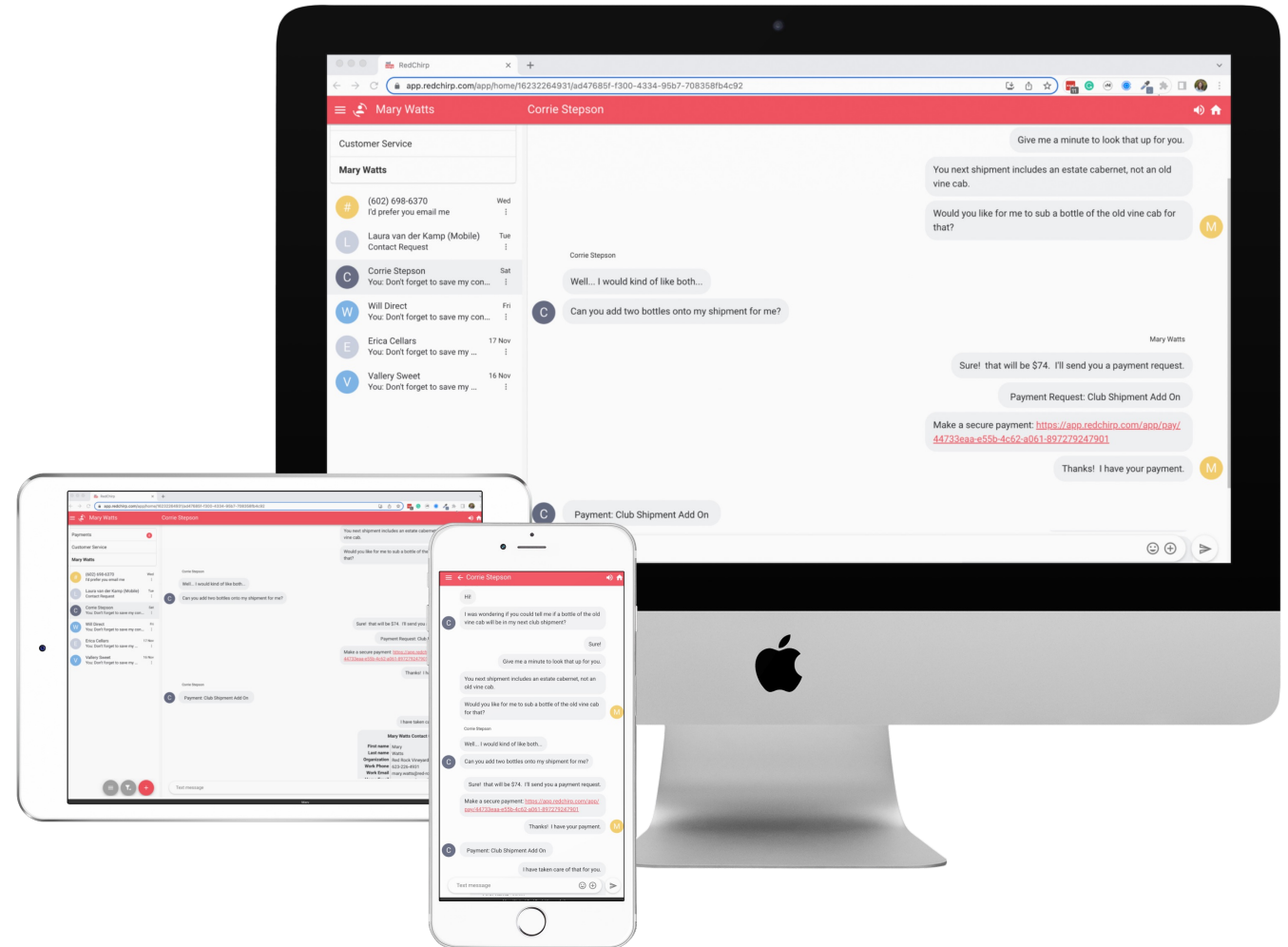
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Do I have to buy everyone cell phones?

Look for business texting platforms that:

- work on all internet-connected devices
- use personal phones *without* sharing personal phone numbers
- control individual user availability
- centrally control access and phone number assignments



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How do I track these communications?

Look for business texting platforms that:

- allow all users to see each other's texts
- automatically alert you about other conversations
- elegantly handle teams texting from the same phone number
- and integrate with your other tools

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Am I allowed to text my customers?

When it comes to consent, consider four things:

1. The law: Telephone Consumer Protection Act (TCPA)
2. The guidelines: CTIA Messaging Principals and Best Practice
3. Your customer's experience
4. Your unique alcohol industry regulations

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How will we find time to text?

RedChirp users report saving an average of **5-6 hours each week** they were previously wasting on unproductive phone tag.

- You can reach out to more people in less time
- And they get back to you faster too!

Customer → Employee Response Time in RedChirp

| Time | Percentage |
|-----------------|------------|
| Less than 1 min | 22.8% |
| Less than 2 min | 59.6% |
| Less than 3 min | 76.9% |
| Less than 4 min | 88.7% |
| Less than 5 min | 91.9% |

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Objectives of an SMS Marketing Strategy

Meet the Customer Where They Are

SMS is the opportunity to meet customers where they are spending the most time communicating.

Make it Personal

Conversational text marketing allows you to harness the power of real engagement, creating an emotional connection between the customers and the brand.

Optimize the Digital Outreach

Unique engagement opportunities that span from notifications to customer support, to product announcements and upselling.



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Executing an SMS Marketing Strategy

Messages to Consider

- Triggered Messages
- Transactional Messages
- Promotional Messages

It is an omnichannel opportunity, not either/or

Stage 1:

- Prepare a Welcome Series
- Incentivize Subscribers
- Keep Growing the List

Stage 2:

- Segmented Customer Sales Campaigns
- Time Sensitive Messages
- Customer Convenience Messages

Stage 3:

- Highly Targeted Communication
- Engagement Campaigns
- Two-way, Personal Communication

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Results of SMS Marketing

Triggered & Transactional Messages

- **Shipment tracking links** have decreased returned shipments by 70%.
- **Reservation confirmation** messages have improved on-time appointment arrivals.
- **Credit card expiration** reminders have improved club billing responses by 60% with less labor.
- **Post-visit follow-up** messages resulted in 32 5-Star Google Reviews in 3 months.

Promotional Messages

- **Club Allocation Add-ons** from SMS campaigns are 34% of total club channel sales (YOY Δ 100%).

• **Lost and Dormant Customers** re-engaged after unsuccessful email conversions.

- **A/B Testing** suggests pre-email messaging positively influences seasonal release email open rates and unsubscribes.



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Lessons of SMS Marketing

- 1. Have a clear definition of the SMS strategy.**
- 2. Don't treat SMS marketing like email marketing.**
- 3. Be strategic and have a goal in mind.**
- 4. Be ready to reply.**

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Round Pond Estate SMS Evolution

“Hi [FIRST NAME], this is Christina at Round Pond! Our 2015 Estate Cabernet is available today only and I know it’s a wine you’d enjoy so I wanted to make sure you didn’t miss out!”

Phase 1: Service-Driven Sales

- Personalized
- From a familiar name at the winery
- Soft sell
- Fun/conversational
- Relevant

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Round Pond Estate SMS Evolution

“Hi [FIRST NAME], we’re excited to ship your Round Pond Gravel futures on 11/14! The address we have is 123 Main St, Napa CA. Please respond YES if this is correct address or reply with your updated shipping address.”

Phase 2: Service

1:1 texts for effective customer service and relationship building

- Address confirmations
- Weather hold release
- Last chance to customize shipment
- Payment links via telesales
- Concierge services
- Personalized assistance/recs

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Round Pond Estate SMS Evolution

Triggers:

Klayvio emails

Webhooks

Customer behavior

Phase 3: Automations

- Shipment Tracking
- Decline cards
- Cart Abandonment
- Birthday
- Club Anniversary

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Top-5 SMS Campaigns of 2022

Top-5 Automated SMS Campaigns - 2022

U.S. Retail Segment

| Message Type | Revenue per Text | % Sales Boost |
|------------------------|---------------------|------------------|
| Welcome Series | \$3.72 | 1967% |
| Transactional Updates | \$1.16 | 544% |
| Cart Abandonment | \$1.04 | 478% |
| Browse Abandonment | \$0.56 | 211% |
| Post Purchase Sequence | \$0.51 | 183% |
| SMS Broadcast Message | \$0.18 | - |

Source: Listrak - 2022



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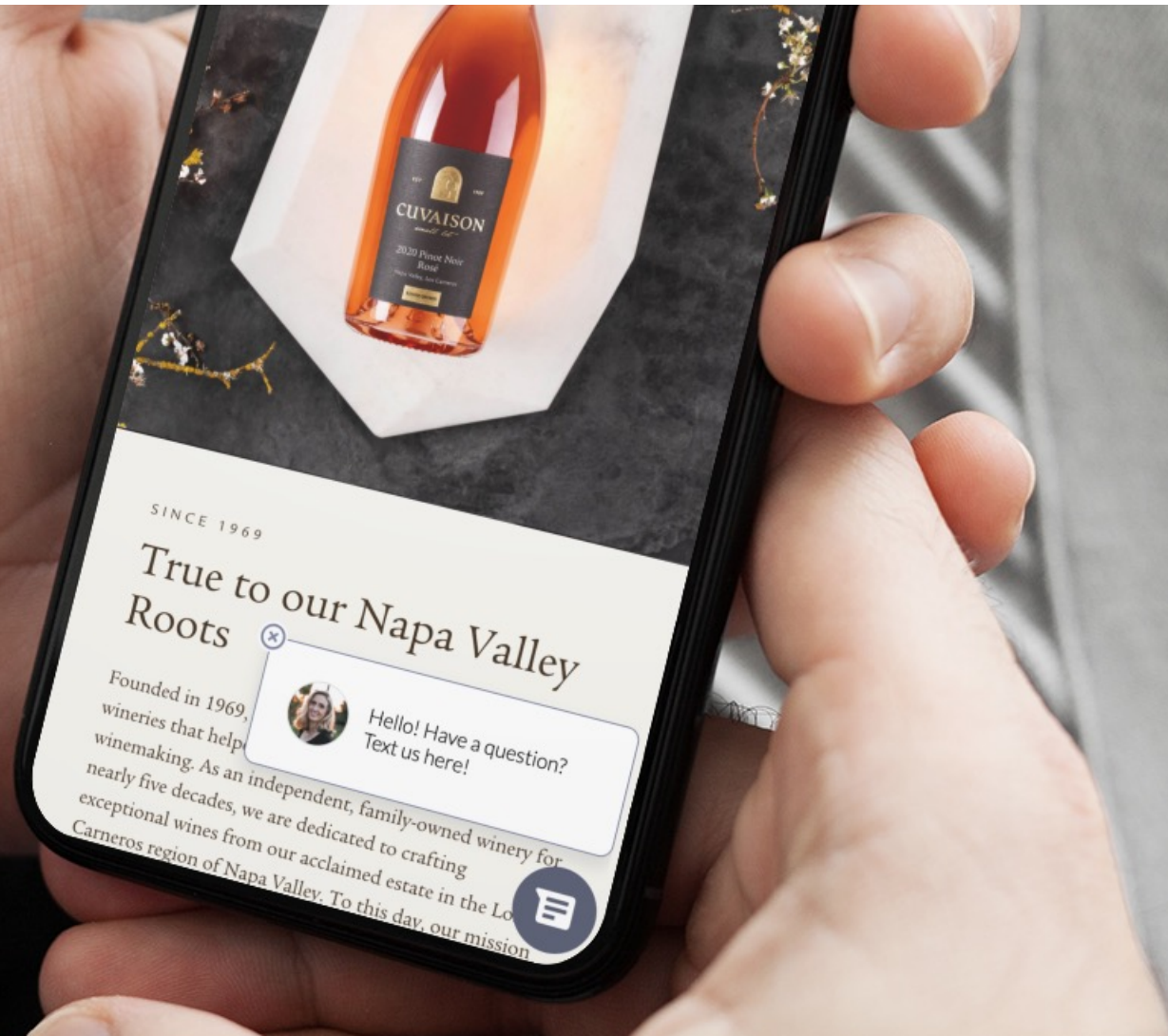
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1. Modern Twist on Webchat:

It looks like this:



2. One-on-One Customer Service

The screenshot displays a mobile messaging application interface. At the top, a red header bar contains a menu icon, the name "Mary Watts", the name "Will Direct", and a home icon. Below the header, the left sidebar shows a list of messages with a red notification badge showing the number "8". The main chat area shows a conversation between Will Direct and Mary Watts. The messages are as follows:

- Will Direct: "Hi! 😊"
- Mary Watts: "I was wondering if you could tell me if a bottle of the old vine cab will be in my next club shipment?"
- Will Direct: "Sure!"
- Mary Watts: "Give me a minute to look that up for you."
- Will Direct: "You next shipment includes an estate cabernet, not an old vine cab."
- Mary Watts: "Would you like for me to sub a bottle of the old vine cab for that?"
- Will Direct: "Well... I would kind of like both..."
- Mary Watts: "Can you add two bottles onto my shipment for me?"
- Will Direct: "Sure! that will be \$74. I'll send you a payment request."

At the bottom of the chat area, there is a text input field with the placeholder "Text message", a plus sign icon for attachments, and a send button. The bottom status bar shows "Mary Watts (Red Rock Vineyards)" and a close icon.

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3. Collecting Payment Information

The screenshot shows a mobile application interface for RedChirp. At the top, the browser address bar displays `app.redchirp.com/app/home/16232264931/cee4e7fb-a5d5-4e3b-9aa2-11d694499d12`. The app header is red and contains the name 'Mary Watts' on the left and 'Jennie Gilbert (Mobile)' on the right. A navigation menu on the left lists 'Payments' (with a red badge showing '8'), 'Customer Service', and 'Mary Watts'. Below this is a list of recent messages from other users: Jennie Gilbert (Mobile) 3 min, Corrie Stepson Wed, Will Direct Tue, Erica Cellars Mon, and Vallery Sweet Sun. The main chat area shows a conversation with Jennie Gilbert. A bulk message from Mary Watts at 3:42 PM reads: 'Hi Jennie, this is Mary with Red Rock Wines. We were unable to process your Winter Wine Club shipment using the card on file (ending in 1411). Please take a moment to update your payment info so we can send you your beautiful wines! 1. Update your account at <https://redrockwines.com/members-login> 2. Or I can text you a secure link so you can provide it right from your phone 3. Or let me know if you prefer I give you a call instead 😊 P.S. Don't want me to text you? Just reply 'STOP'. Cheers 🍷'. Jennie Gilbert replies: 'Oh shoot! Yes, please send me the link 🙏'. Mary Watts replies: 'No problem at all! I'll text you that link in just a moment.' The bottom of the screen shows a text input field with 'Text message' and a red circular button with a plus sign. A footer at the very bottom reads 'Mary Watts (Red Rock Vineyards)'.



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RedChirp

app.redchirp.com/app/home/16232264931/cee4e7fb-a5d5-4e3b-9aa2-11d694499d12

Apps RedChirp (Live) RedChirp (Staging) RedEx

Mary Watts Jennie Gilbert (Mobile)

Payments 8

Customer Service

Mary Watts

J Jennie Gilbert (Mobile) now
You: <https://red-rock.clk4.wine/...>

C Corrie Stepson Wed
You: Don't forget to save my co...

W Will Direct Tue
You: Don't forget to save my co...

E Erica Cellars Mon
You: Don't forget to save my co...

V Vallery Sweet Sun
You: Don't forget to save my co...

We were unable to process your Winter Wine Club shipment using the card on file (ending in 1411). Please take a moment to update your payment info so we can send you your beautiful wines!

1. Update your account at <https://redrockwines.com/membe-r-login>

2. Or I can text you a secure link so you can provide it right from your phone

3. Or let me know if you prefer I give you a call instead 😊

P.S. Don't want me to text you? Just reply 'STOP'. Cheers 🍷

Jennie Gilbert

Oh shoot! Yes, please send me the link 🙏

Mary Watts

No problem at all! I'll text you that link in just a moment.

Payment Request: Gilbert Club Update

<https://red-rock.clk4.wine/gsNdyXXq>

The link has not been clicked yet

Text message

Mary Watts (Red Rock Vineyards)

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RedChirp (1) x RedChirp x +

app.redchirp.com/app/home/16232264931/cee4e7fb-a5d5-4e3b-9aa2-11d694499d12

Apps RedChirp (Live) RedChirp (Staging) RedEx

Mary Watts Jennie Gilbert (Mobile)

Payments 9

Customer Service

Mary Watts 1

J Jennie Gilbert (Mobile) now
Payment

C Corrie Stepson Wed
You: Don't forget to save my co...

W Will Direct Tue
You: Don't forget to save my co...

E Erica Cellars Mon
You: Don't forget to save my co...

V Vallery Sweet Sun
You: Don't forget to save my co...

Jennie Gilbert

Oh shoot! Yes, please send me the link 🙏

Jennie Gilbert

Payment: Gilbert Club Update

Mary Watts

No problem at all! I'll text you that link in just a moment.

Mary Watts

Payment Request: Gilbert Club Update

<https://red-rock.clk4.wine/gSndyXXq>

The link has not been clicked yet

Jennie Gilbert

Jennie Gilbert

Payment: Gilbert Club Update

Text message

Mary Watts (Red Rock Vineyards)

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4. Bulk Messages

Informational Messaging:

- Last chance before club Credit card declines
- Delinquent pickups

Promotional Messaging:

- Text only offers
- Short skus
- Flash sales



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The screenshot shows the 'Bulk Message Details' page in the Red Chirp app. The message text is: 'Hi %first_name%, this is Mary with Red Rock Wines. We were unable to process your Winter Wine Club shipment using the card on file (ending in %Last_Four%). Please take a moment to update your payment info so we can send you your beautiful wines! 1. Update your account at https://redrockwines.com/member-login 2. Or I can text you a secure link so you can provide it right from your phone 3. Or let me know if you prefer I give you a call instead 😊 P.S. Don't want me to text you? Just reply 'STOP'. Cheers 🍷'. Below the message is a 'No Attachments' section with a 'Send a contact card with bulk message...' link and an 'MMS' button. The 'Shorten Links Using' section is set to 'Do not shorten links'. The 'Recipients' section contains a search bar and a table with columns: First, Last, Phone Number, Last_Four, Custom Message, Sent Time, Status, and Action. The table lists six recipients: Troy Moody, Brittany McCormick, Charlene Bell, Roland Newman, and Hazel George. The bottom of the screen shows the user 'Mary Watts (Red Rock Vineyards)'.

| First | Last | Phone Number | Last_Four | Custom Message | Sent Time | Status | Action |
|----------|-----------|--------------|-----------|----------------|-----------|--------|--------|
| Troy | Moody | [REDACTED] | 2585 | No | | | ⋮ |
| Brittany | Mccormick | [REDACTED] | 8520 | No | | | ⋮ |
| Charlene | Bell | [REDACTED] | 7410 | No | | | ⋮ |
| Roland | Newman | [REDACTED] | 9155 | No | | | ⋮ |
| Hazel | George | [REDACTED] | 4944 | No | | | ⋮ |

5. Automations

- Your wine has shipped
- Reservation confirmations, reminders and follow-ups
- And from email triggers

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Text message interface showing a conversation with Adam Ryan (Coursey Graves).

Adam Ryan (A): You are very welcome. It is our pleasure. To hold your requested reservation we will need a credit card on file. You will be receiving a secure, PCI-compliant link to conveniently upload your card. If you have any difficulties or concerns, please feel welcome to call me at this number.

Adam Ryan (A): Payment Request: Reservation Hold

Adam Ryan (A): <https://courseygraves.clktxt.com/VsnEMrIR>

The link has been clicked 2 times

4 Nov

Shannon (S): Payment: Reservation Hold

Shannon (S): Done! Thank you again Joanne!

7 Nov

Automated Message: Reservation Created

Adam Ryan (A): Hi Shannon. This is the team at the Coursey Graves. Your seated tasting in Healdsburg Lounge (113 Mill Street, Healdsburg, CA) is scheduled for 4 guests on Saturday, December 17th at 4:00 PM. An email confirmation has also been sent. Let us know if you would like a referral for any Healdsburg restaurants and wineries.

7 Nov

Shannon (S): Thank you so much! Yes, we would love a dinner or cocktail bar rec for dinner in Healdsburg 😊

7 Nov

Adam Ryan (A): Hi Shannon. If you can secure a reservation at The Matheson, we highly recommend it. Pizzando, Valletta, and Barddiva are also terrific.

Text message input field with icons for emojis, attachments, and sending.

Best Practice: Preference-Based Texting

❖ Preference-Based Texting

- Ask consumers what promos they want
- Use customer preference & behavior to target promotional campaigns

❖ Business Benefits

- Boosts customer response 300-500%
- Fewer unsubscribes
- Better consumer experience

JOIN OUR TEXT CLUB

Name *

Mobile Phone *

Your Interests *

Tasting Room Specials

New Wine Releases

Upcoming Winery Events

Terms and conditions
I'M OVER 21 YEARS OLD and agree to receive promotional messages sent via an autodialer, and this agreement isn't a condition of any purchase. I also agree to the Terms of Service and Privacy Policy 4 Msgs/Month. Msg & Data rates may apply.

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