



Success Story

Moshin Vineyards



Sovos ShipCompliant saves Moshin Vineyards over 50 hours a month to manage its DtC compliance process, improving the overall customer experience.

Business Challenges

- ▶ Replicating state reporting forms in spreadsheets and manually changing destination sales tax was time-consuming
- ▶ A wine-industry management system lacked the functionality to help the team be more proactive and required the team to look up state tax and licensing rules

Solution

- ▶ ShipCompliant Direct eliminates manual end-to-end DtC state reporting challenges.
- ▶ Robust regulatory database eliminates non-compliant shipments and improves the customer experience.

Benefits

- ▶ Moshin Vineyards saves over 50 hours a month to manually manage its compliance process.
- ▶ Immediately informs the team of any compliance issues at the POS eliminating shipping issues
- ▶ Improves accuracy of state information in one centralized location

The Company

Moshin Vineyards, family owned and operated, has been producing terroir-driven and delicious wines in the Russian River Valley for 30 years. Rick Moshin, owner and winemaker, sustainably farms his own prized Goldridge-soil Pinot Noir vineyards, and using the natural yeasts of his grapes — plus the help of a dedicated winemaking team — gently makes small-lot, premium wines in the company's gravity-flow winery, which produces approximately 10,000 cases annually with 50/50 DtC and 3 Tier distribution, on Sonoma County's famed Westside Road.

The Challenge

Moshin Vineyards was replicating state reporting forms in spreadsheets, manually transferring data from hard copies and submitting forms at the end of each month. This process, including charging all of the destination sales tax by hand, was time-consuming and repetitive and relied heavily on staff members to know each state's individual rules. In an attempt to address these challenges, the company upgraded to a wine industry management system with some reporting functionality but lacked the ability to enter state permits and be reminded of upcoming license expirations.

The Solution

Moshin selected ShipCompliant Direct to help with DtC state reporting in 2013 at the same time it was looking at a wine club solution. A clear advantage in choosing ShipCompliant was its integrations with a large number of the most widely-used front-end systems in the industry. From initial search to demo and implementation, Moshin was up and running within a month. Since then, it has eliminated manual state reporting at each step. For DtC shipping, Moshin has the support of ShipCompliant's robust regulatory database to eliminate noncompliant shipments. Additionally, Moshin Vineyards considers Sovos ShipCompliant to be the cornerstone of its DtC compliance process, electing to choose only from the 60+ solutions that integrate directly with the solution.

“We selected ShipCompliant first and absolutely fell in love with the idea of how it managed the DtC compliance process. Then we found software that would work with it, not the other way around. We were up and running within a month and humming along just perfectly normal within a quarter. ShipCompliant makes it possible to do our job and we can trust that the information from ShipCompliant is accurate. You just can’t put a price on customer satisfaction and peace of mind.”

Julia Lander, Director of Hospitality

Why Sovos ShipCompliant?

Sovos ShipCompliant offers a comprehensive resource for state regulatory information. When a new state becomes available for DtC shipping, the forms and links to the state licensing documents are immediately available to allow Moshin Vineyards to start the registration process. The Moshin team appreciates ShipCompliant’s automatic notifications on state reporting due dates, license expirations and custom customer shipping email notices to ensure customers get their packages.

The Results

Prior to ShipCompliant, it took Moshin Vineyards easily over 50 hours a month to manually manage its compliance process. The team also had to check multiple places to confirm the accuracy of the information. The customer experience has also improved as ShipCompliant is connected directly to the POS and immediately informs the team of any compliance issues. In the past, team members would occasionally have to alert a client to a shipping issue after the fact.

Julia Lander, Director of Hospitality, summed it up by saying, “We no longer have to go looking for second opinions. We don’t have to worry that we’ve done something wrong, such as hitting an aggregate limit or overpaying tax. ShipCompliant keeps us organized and is easy to use, and the support is great if I ever need help.”

ABOUT SOVOS SHIPCOMPLIANT:

Sovos ShipCompliant is the leading compliance and technology platform for alcohol producers. ShipCompliant offers real-time cloud-based solutions to beverage alcohol companies to ensure compliance with federal and state laws for direct-to-consumer and three-tier distribution.

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