

HOW TO EVALUATE A NEW DTC SOFTWARE PARTNER FOR YOUR WINERY

Have you been considering a new DTC software solution for your winery? Choosing the right partner is critical as you scale your business. You've invested so much already crafting your wines and building your brand; make sure your software partner can support you for the long haul and position you for future growth. With the right tools, you'll be able to easily manage a larger wine club, provide unparalleled customer service, gain insights into your customers with detailed reporting, and automate time-consuming administrative tasks so you have more time to focus on what really matters: driving customer loyalty and increasing sales.

It can be a daunting task to sift through your options to make sure you're choosing the best DTC software partner for your winery. Here, we've outlined some key things to look for and the right questions to ask as you make your choice.

Key Traits to Look For



PROVEN TRACK RECORD

The DTC partner you choose should be well established in the space with success stories from wineries just like yours. That experience is important for more than a trust mark alone: you need to know that you'll be supported by sound technology with superlative uptime and that there are plans in place to handle surges in traffic and sales. Don't put your winery into the hands of newcomers who haven't yet worked out all their kinks.



SCALABILITY

You'll also want to reference a solution's track record as it refers to scalability. What is the average size of wine clubs hosted on a given software solution? What about average sales volume? If the numbers are low, there's no proof that they'll be able to support your business as you grow. Don't take the risk of choosing a partner that may limit your ability to succeed.



ALL-IN-ONE SOLUTION

Look for a partner that provides everything you need within one unified platform. As you implement technology, be wary of purchasing separate platforms that fix one-off issues. Creating a stack of "solutions" that don't speak to one another will decrease efficiency and create additional headaches. A unified, all-in-one solution gives you a true 360 degree view of your customer, enabling you to provide superior service and operate more effectively as a result.



STRONG SUPPORT

You need more than just software from a DTC partner. Make sure your provider offers strong support to help you get the most from your tools, from onboarding services to ongoing training options, robust documentation and how-to guides, as well as a bench of support professionals available 7 days a week. Also look for in-person educational events, client roundtables and training opportunities: nothing can replace that face-to-face interaction.

Features Checklist

Check for these features when you're evaluating a DTC software partner in order to make sure you don't miss out on important tools that can have an outside impact on your business.



1. WINE CLUB CUSTOMIZATION

According to WineDirect proprietary data from 1800+ wineries and over 1 million club members, 29% of consumers leave wine clubs because they receive wine they don't like. However, club customization is extremely difficult to manage manually, especially as your membership grows. Increase your retention by offering a customized wine club option, enabled by easy-to-use technology behind the scenes.



2. AUTOMATED CREDIT CARD UPDATES

Credit card changes happen all the time. Whether a card is lost, changed or cancelled — don't be the last to know as you prepare to send out a shipment. The effort it takes to then track down your wine club members with expired card information and get the updated numbers can be avoided with a DTC solution that automatically handles this as part of the wine club process.



3. EASY-TO-USE WEBSITE TEMPLATES

Your winery needs a beautiful, intuitive, front-facing website that's also easy for you to update. Make sure your DTC software partner offers free, easy-to-use templates that you can implement and edit yourself, without having to hire a costly designer. With almost 50% of winery website traffic coming from phones and tablets, you'll also want to ensure the templates are mobile-friendly.



4. AUTOMATED MARKETING EMAILS

Collect guest information in the tasting room and then provide a personalized follow up — automatically. An ecommerce system that connects to your marketing efforts will enable you to automate follow-up emails, abandon cart reminders, happy birthday messages and more with a touch of a button. Continued communication will keep your customers engaged and coming back for more.



5. ROBUST REPORTING

It's critical to be able to accurately track your wine club and tasting room success and promote future benchmarks among your employees. A DTC system that provides you with these key business insights will help you drive more conversions and motivate your employees to engage further with your guests.

Important Questions to Ask

Here are some key questions you should ask as you evaluate a new DTC software partner.



1. WHAT'S YOUR COMPANY HISTORY AND WHO'S ON YOUR TEAM?

Like any partnership, it's critical you understand who your ecommerce provider is. You are entrusting a key portion of your business to them, so be sure to dig below the surface and really get to know them before taking the plunge.

Suggested Questions:

- What's your company history?
- How are you funded and are you profitable?
- Who is on your leadership team and what is their background?
- How many wineries do you work with and who are they?

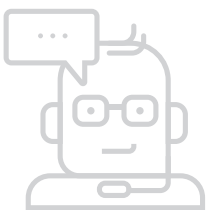


2. WHAT ARE YOUR SECURITY & COMPLIANCE PROTOCOLS?

Wine is a heavily regulated industry and consumer privacy is increasingly in the spotlight: make sure your partner takes these issues seriously. Your DTC software provider should be committed to maintaining customer data privacy and keeping up to date with compliance standards like PCI and ADA (Americans with Disabilities Act).

Suggested Questions:

- Are you PCI compliant? How do you maintain your compliance?
- How do you protect my customer data and ensure privacy?
- Are you ADA compliant? Do you have an ADA audit partner?



3. WHAT IS THE ONBOARDING PROCESS? WHAT EXTENDED SUPPORT IS OFFERED AFTER PURCHASE?

You want a partner that will support you throughout — and beyond — the onboarding process. There is nothing worse than not being able to use an expensive tool you've purchased due to uncertainty or confusion. Make sure you'll have access to ongoing, hands-on training in addition to a robust online library of documentation and how-to guides. Being told “you can call my cell” or “our tools are intuitive to use” is not sufficient.

Suggested Questions:

- What is your onboarding process? Will I have a dedicated in-house specialist to help me get up and running?
- What ongoing training options do you offer?
- How big is your support team? How have they grown over the past few years? When are they available?

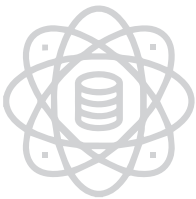


4. WHAT IS YOUR PRODUCT DEVELOPMENT PROCESS?

It's important to choose a partner with a strong product team that prioritizes customer success and feedback. Look for a provider who uses feedback from a diverse group to inform what new features and tools they choose to build. You want to make sure the platform will be built for your needs, not someone else's. Ask about their beta testing processes to ensure you don't get stuck with buggy software.

Suggested Questions:

- How do you create your product roadmap and decide what to build?
- How do you gather customer feedback for new features?
- How do you roll out new features? Do you allow users to opt in / out?
- Do you have a beta testing group?



5. WHO WRITES YOUR CODE?

Beware of companies who depend on contractors or 3rd parties to develop their tools rather than an internal team; outside groups are incentivized to bill more hours, not necessarily to build the best solution. In some cases, small companies will even trade customer licensing fees for software engineering services, essentially giving another winery access to your proprietary information. You should also look for a company with a diverse engineering team: it's risky to rely on a single star programmer and working with a strong team will yield more consistent results.

Suggested Questions:

- Who is on your engineering team and how is it structured?
- Do you outsource development work to contractors or 3rd parties?
- Do any other winery customers have access to my data?

Evaluating a DTC Solution for Your Winery

Finding the right DTC software partner is critical to ensure future success for your winery. The potential benefits are expansive and extremely impactful if you choose the right option. But it's a big decision and can be a challenge to evaluate all the information you'll receive. Carefully consider each of the traits, features and questions highlighted in this guide, and you'll find the right solution to help grow your winery's membership base, attract more customers and achieve DTC success.

SPEAK TO OUR TEAM TODAY!

Learn how WineDirect can help your winery achieve DTC success.

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