

# BUYER'S GUIDE TO Wine Production Software



What you need to ask software providers  
before you sign on the dotted line

## As you explore your options for production software there are many important considerations. How do you properly assess the solutions to decide what's best for your winery?

In this Buyer's Guide, you'll get the resources you need to navigate the sales process and will help you answer several critical questions, including:

- ✓ **Why do we want to implement production software?**
- ✓ **How do we expect to benefit from production software?**
- ✓ **Is this the product that best fits our needs?**
- ✓ **How do I ensure the software will be the right fit for years to come?**

When it comes to improving your data management practices, it's critical that you choose the right partner that aligns with your production priorities.





## First: Why Are You Considering Wine Production Software?

Wine Production Software can provide many benefits, such as:

- ★ **Simplify your professional life by streamlining communication and workflows**
- ★ **Capture and report on winemaking data, including analytics, additives, movements, and observational notes**
- ★ **Access higher visibility into winemaking trends, quality implications and production costs**
- ★ **View production information anywhere, including from home**
- ★ **Simplify TTB and government reporting**

Before you start the selection process, it's important to consider what aspects are most important to you. Narrowing down the "why" behind your decision to look for production software is the first step to finding the perfect production platform for your needs.

## Questions to Ask Internally

It's important to prepare well before diving into the buying process. Knowing the answers to these questions will help you narrow down your initial search and help you get the most out of sales consultations, meetings, and demos:

- ✓ **What are our goals to improve production tracking over the next 5 years?**
- ✓ **What are our biggest struggles when it comes to production management and workflow?**
- ✓ **Are we satisfied with how we're managing TTB reporting, cellar inventory, and/or production costs?**
- ✓ **How much value would we get from having a single source of truth for all inventory, compliance and reporting?**
- ✓ **What's our budget for production software?**

## Questions to Ask the Production Software Provider

When you meet with a software provider's sales rep, they should talk to you about your goals for the winery and what you want out of the software. During the demo ask these questions to help you discern between a strong candidate for your business and one that should raise concerns:

### **Is your product intuitive enough to quickly learn and fully utilize?**

If the product is difficult to navigate, limited in flexibility, tough to keep up-to-date, or doesn't accurately reflect what happened in the winery, the system quickly depreciates in value. Wine production software is only as powerful as the data it contains. Clean user interfaces as well as data accuracy and reliability should be of the utmost importance when selecting a solution.

### **Is your team constantly advancing the product? If so, how?**

Are they actively releasing new valuable features or are they just making minor adjustments? Ask to see their release notes, and inquire about their product roadmap. What would you have to look forward to as a client? Think 5, 10, even 20+ years down the line. Choose a modern product that will continue to evolve, not stagnate.

### **Can your system handle the complexity of my production practices?**

Make sure your unique needs are managed effectively with the software. Can you properly emulate winery actions such as topping many wines at once, manage multiple fermentations under a single lot, and capture press fractions and lees effectively? Do you track vessels such as barrels, bins, kegs or carboys? Make sure the system clearly differentiates between them. Now is the time to dive in deep and address these granular aspects of production tracking.

### **What is the implementation process like?**

The most effective onboarding is when the software provider does the heavy lifting for their clients. The database should manage industry-standard lists for appellations, varietals, and other known attributes so you don't have to. You should just be required to enter or import your winery-specific inventory: lots, vessels, vineyard sources and volumes. If you're a small winery they should offer a simple self-onboarding process, and if you're a large or complex winery they should have data import and data migration services available.

### **What kind of customer support do you offer?**

The best software companies invest heavily in online resources and tools to make their clients successful. Validate that the provider not only has multiple channels to get your questions answered but that keeping the sources up to date is a top priority. Require them to have a robust online support center with videos, tutorials and helpful articles. If you need to reach a support representative, make sure unlimited email and phone support is included in the base subscription price. If they charge extra for support, it likely means they have issues managing it.

### **Does your founding team, sales and support staff all have backgrounds in wine production management?**

It's essential that the entire software team has been through the production trenches that you have. Without that experience, it's near impossible to truly grasp your data and workflow requirements. This vast understanding benefits not only customer support but product development as well. You want to find a team that is as dedicated and experienced as you, that can consult with you on best practices and help you make better wine. You want a partner and expert in winery technology and operations management.

### **How do you handle security and data privacy?**

Have the provider lay out their data management strategy and the steps they've put in place to protect your information. Unencrypted, HTTP access can leave your data completely vulnerable and exposed. Make sure security is a top priority for them.

# COLLABORATIVE VALUE

## How a Cross-Functional Wine Production Software Platform Improves Every Step of the Winemaking Process

### Viticulturist & Grower Relations

Gain insight into your estate vineyards and sourced fruit, manage the growing season, and harvest with confidence. You'll be able compare vintages and identify new opportunities to improve quality.



**VITICULTURIST**



**WINEMAKER**

### Winemaker

Spend more time working on the business instead of in it. Wine production software gives you the high-level insights you need to identify what's successful and what can be improved. Streamline your note taking, reporting, and other administrative tasks so you can spend more time making the best wine possible.

### Lab & Cellar

Tackle your to-do list more efficiently with mobile work orders and assignments. Share notes and updates with your team instantly. Check to see if the software integrates with lab partners, so you can receive analyses through the platform as soon as testing is complete.



**LAB &  
CELLAR**



## OPERATIONS

### Operations

Never fear the 5120.17 TTB report again—wine production software can generate these reports whenever you need based on the data captured throughout the year. You'll also benefit from the high-level insights when it comes to making big picture decisions.

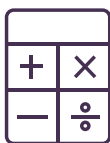
### Finance

Track your costs, control your margins, and set prices with confidence. Wine production software simplifies your reporting, accounting, and forecasting.



## FINANCE

## TAX & COMPLIANCE



### Tax & Compliance

Grant access to your tax and compliance specialist so they can generate and export the exact reports they need to do their job, leaving you to do what you do best: make great wine.

### Sales & Marketing

Stay fully informed on the technical specs of every wine, both finished goods and in the cellar, so you can meet sales and marketing initiatives and wow your customer base.

## SALES & MARKETING



Innovint





## Experience Matters

Designed by winemakers, for winemakers, InnoVint is a blend of professional winemakers and modern technologists who are passionate and dedicated to modernizing how the winemaking process is managed.

## Respected Industry-Wide

We work with over 500 wineries and renowned academic institutions around the world. The best vintners trust our technology and our expertise. Our internal team has over 30 vintages under our collective belts and degrees from top winemaking institutions including University of California, Davis and University of Adelaide in Australia.

## Napa Valley Meets Silicon Valley

Founder and CEO Ashley DuBois Leonard started working in the wine industry during her studies at UC Davis and has experienced every aspect of the business throughout her 8 years of winemaking and operations management. Like many of her fellow winemakers, Ashley struggled with the existing software options to manage production in a timely, effective manner. After a stint working in Silicon Valley, her exposure to mobile data management systems paved her vision for a flexible and intuitive winery management software that would help wine producers save time and streamline production. InnoVint was founded in 2013 to transform the industry's data management practices. Today we're empowering wineries of all sizes to make the best wine possible using the most powerful yet approachable production software available.





**See the Future of Wine Production**  
Once you get a taste of InnoVint, you'll get it.

**Schedule a demo today and learn how InnoVint  
can maximize your winemaking potential.**

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