

Beautiful People,

These are my notes from the 1/29 meeting. Please use these as a supplement to your own.

I counted 58 people in the room.

Our host today is [Joseph Phelps](#) as represented by the wonderful Patti Sevigny and longtime member of the NVHF forum.

Phelps purchased the property in 1973 when it was just a cattle ranch. In 2013 the site went through major renovations. Phelps lived to see it completed but then passed. The Brand and Estate was purchased in 2022 by Moet/Hennessy and went through another refresh.

They offer tastings from the founder's tasting which can be had on the beautiful terrace to full culinary 6 course experiences. Experiences range from \$20 to \$350.

The Holiday Party was a success! We had a lot of fun. Due to the terrible weather we had to move in-doors and it was not as raucous as possible. The donations were fantastic. THANK YOU to Raymond, Sullivan, Fantesca for yearlong clubs, chef catered lunches and big bottles, oh my! Thank you to all who donated!! Everyone shared and left with amazing wine and wine schwag. The warmth was palpable.

Please visit the [website](#). The website will grow and become even more of a resource thanks to the donated time of Jo Holm, a marketing and events wine pro, who will be helping with the website.

Galen is going to die on the RSVP-hill, pen-bloody reservation sheet in-hand.

"Repondez s'il vous plait", translates to "Please Respond", not YES, but RESPOND- *Yes, no, Maybe*. If we don't hear from you, then we don't know if you're coming or not. This helps our hosts to know how many bagels, coffee, seats and the room to use. It also allows us to get people off the waitlist.

Community Corner this month is LA Fire Relief. Patrick Volner has put together a great sheet of charities to look into. He also made a great point about donating. Make the donation something personal to you, which makes it easier and more meaningful. If you have cats and have cat food shipped to your house, you could redirect that shipment- *it was already part of your budget-spend and you like cats*...If you like to cook, cook. Giving in a way that is personal and part of your normal routine makes it easier to give. The fire relief charities are:

[Los Angeles Regional Food Bank](#)

[Best Friends Animal Society](#)

[World Central Kitchen](#)

[Dream Center](#)

[Direct Relief](#)

Galen abused his power and asked for donations of wine for a specific fire victim family of LA. People he considers family. After his mom passed, the only person that calls/is called Mom. Tessa, who he calls MOM, is a community doc who just moved from Napa to LA. Every year they do a shoe box Christmas party in which they collect gifts for the needy. This year at Xmas they collected several hundred gifts. He did not ask for money, just for wine. You can email him at, galen@beckerdrace.com

Another nonprofit with a QR, which is easy to donate time/be a part of is, [Be My Eyes](#). Galen is active and donates time to this. Be My Eyes is a service for the blind which can be serviced through your phone. You act as the blind's eyes helping them with everything from reading instructions to picking out an outfit.

Pulse of the Valley,
comparing Dec. 24 to Dec. 23
-poll results don't look too bad:

ALL DTC
60%UP
25% Even
15% Down

TR
50u
30e
20d

Fax
70u
15e
15d

Visitation
40u
30e
30d

AVO
50u
30e
20d

Club Sign-ups
20u

40e
40d

Cancelations
30u
40e
30d

OND gift ordering
50u
30e
20d

How many saw groups
of 10+ 80%
of 25+ 30%
of 40+ Raymond, Monticello, Montellena, Caymus, Brasswood, +

How many allow walk-ins, or for wording sake, same-day appointments?
90-95%

How many saw last sec. res?
70%
Why?

Bob said that the weather in Dec. was not bad- the good weather brought day trippers to urban tasting rooms.

Is it the demographic change of the consumer and their preferences?
Members answered that the age range of last min. is all over the place.

We are starting to see more conference traffic from Napa and SF, a slight harkening to days of yore.

Patti of Phelps said that they are seeing more corporate group reservations, both last min and reservations far in advance (12-18mos)

The group agreed with their experience. Even corporate and large groups have been/starting to be last sec.- One urban tasting room saw walk-in groups from 7 up to 15 people.

Jo Holm asked if anyone was yet seeing more reservations for all the large events happening in the bay area over the next year: Superbowl, World Cup, etc.

Pete reminded us that for the walk-ins and last-min, there should be more experiences and more flexibility with the crowd.

OPEN FORUM

Today's topic, learning and experience of the DTC symposium in Monterey-

This is the first time it was held in Monterey, which lead to some interesting results: Because it was so far from our wine country, almost everyone stayed overnight, which lead to great networking and socializing. Everyone stayed for the last sessions, everyone stayed for the social hour and then the hotel bar was the place to be till late. There were over 700 in attendance and there were 30% more sessions. The biggest complaint was that people couldn't attend all the sessions. -which isn't the worst complaint.

The Keynote opening speech was by the lauded, Karen McNeil, wine expert and author of the Wine Bible. Galen said the speech was dire, but not dead and that she delivered with a poetic flair. She spoke about headwinds and that 'vibe' was important. Particularly the wine country negative perceptions of snootiness and inapproachability. Younger demographics grew up in the inundation of information. They learned to navigate marketing language from the time their little hands could hold a phone and are now the pros at sniffing out bullshit.

Michael Ploetz said that the opening keynote was overly negative and not the best way to start the weekend.

The immediate buzz was around C7 and WineDirect merging. Both have failings. One of Galen's issues with C7 is it's customer support. I heard from a winery owner that his concern was, if he will need to pay to augment the coding of the back end of his website to reintegrate with the changes.

Galen said that one of the biggest topics of the weekend was Ai, which accounted for maybe 20% of the workshops. Some wine Ai services include, [Corkvision](#), [Winespeak Ai](#), [Chat DTC from Wine Pulse](#).

As a valuable tool, it is just that, a tool. Don't make it your sole copywriter. Don't copy, paste, and send. Think of it as an instant 3rd draft. It is a skill to learn to query Ai and takes time. Add as much data as you can, reword and resubmit, get multiple examples to pull from. From my experience with Ai copy, I find it often to be too fluffed with a vanilla-gloss tone. In advertising I was taught that brevity is power. EDIT!

Ai imaging is even harder for things like logos and branding. -As business usage is more esoteric. Generating an image of Chuck Norris spinning the Earth on his finger is easy, but asking Ai for a wine logo that evokes passion and authenticity is much different. For funsies, I'm writing a Sci Fi novel and used Ai image generator to come with space agency logos. I generated 200+ and they're still not right. Budget time and resources, this is a skill.

Forum member said there needed to be more ideas for implementation for ai. We spoke about the need for a panel or best practices breakout group.

Galen said about presentations that a good rule of thumb is wrap up each presentation with take-aways and action items.

Symposium presentation on compliance led to an update on the progress of opening, Mississippi and Delaware, further. Also, much more enforcement, especially, S. Dakota and the 8 shipments they receive a year.

Galen mentioned that all wineries need a compliance specialist. This doesn't need to be a full time employee, this can be a 3rd party hire.

Symposium discussions on consumer texting. If you are not using this, you should. Security is one reason- if texting privately, if you were to send a mass text on a private phone and were busted for opt-in violation, you would receive a fine for each individual wrong number.

How many use [Red Chirp](#)?
60-70%

Are there any other services like Red Chirp?
[Klayvio](#), which is used by Montellena and Baldacci

One forum member said they did a small test on Red Chirp and text and found 70% of their users were under 35.

Galen said antidotally, of a consumer who was older who complained about the texts and then when pressed only complimented the information that it provided, such as tracking.

Vanessa of Louis Martini made the point about text communications that different demographics and different texts are appreciated and require different language. Specifically, Sales vs. ops info, such as tracking. -or Warmth vs. informational.

The point was made not to write an email as a text. -A new and shorter media. In 20 years when ads are displayed like sky writing across your prefrontal cortex, we'll have to rethink our copy again.

Texting is another service that requires time and dedicated work. You must respond quickly. If you were going to wait till tomorrow, the person could have just sent an email.

Again, re: authenticity. The youth can smell digital-bullshit faster than you type.

Galen made the point that authenticity means and looks different for different brands, even if they're under the same umbrella. He used the example of a brand who was killing it with bifurcated messaging. For the affordable brand, socialize and drink-now, which is true for a simple fruity wine that you could easily open casually on a Tuesday with a friend. -as well as other comms for fine wine which spoke to collectability and gourmet food pairings. True to the brand and the wine's usage.

Galen said he attended the workshop of the least appealing, Digital Footprint, and learned good things. The presentation was by [Nordic Click](#).

Minimizing the digital footprint leads to faster load times and better functionality.

Galen said he enjoyed the presentation of Forum member, Luke of Etude and Sterling regarding leadership. Specifically, the strategy for keeping up with staff. (For larger properties, managing multiple locations and large staff), He blocks off 2hr of his time to talk to staff members with no purpose or agenda. -to get to know them, which makes them more receptive to when there is an agenda. Galen said he knew of a leader in the valley who discretely makes sure he has lunch at the same time as the staff, just to be near. Remember, there is no, Open-Door Policy. The policy is that there is NO DOOR.

Note, for all staff sizes, your relationship cannot be just directive. Dictators dictate, Leaders lead.

It was said regarding leading and teaching that when on-boarding, you must set on-boarding goals. This way you know you've accomplished the education of all pertinent tasks, education and philosophy- Large and small. As in, they may have tasted the wine, but do you know how to clock in?

My recommendation is to have a checklist with new-hire things to accomplish, which you and the employee follow through to completion. -and not just a paperwork packet with, "Fill out NDA" etc. but everything from Gate Code, to let's walk through and check the bathrooms twice a day to make sure they are ok- have different front-line staff give tours for perspective, etc.

Our conversation lead to wine club structure and verbiage.

Wine club is/may be transitioning to a different model termed, "Subscription." Part of this is structure and part of this is approachability. 'Subscriptions' are for magazines and toilet paper, which we need, easily buy and commonly use. 'Club' connotes expensive, exclusive and for the wealthy. Structurally, subscription is completely open to a list and is hard forecast. Another version of this, maintained usually by the most exclusive brands, is 'allocation' model- in which there are set times of year where it is possible for allocation members to buy, but in which you are not required to buy anything, but all products sell out if you don't. This is a longer topic to explore at another meeting.

Tim Ennis of Boguetz announced that they moved from their small urban-esc tasting room to the old Auburn James winery on Silverado Trail.

Our meeting was shot and the assets shared by Professional photographer, Richard Wood
<https://www.richardwoodphoto.com>

Note, he is also volunteering his time and expertise as a photographer to the Mentis, mental health non-profit. So...good guy doing good work.

Those are my notes that I can read.

Have a wonderful day,

Jake