

# Increased Visibility and Better Brand Building Interactions with Wholesalers

## Grgich Hills

Napa Valley, CA



## CASE STUDY

### Client Profile

Grgich Hills Estate is an iconic Napa Valley winery, consistently producing wines of the highest quality under the direction of Vintners Hall of Fame inductee and James Beard Award winner, Miljenko “Mike” Grgich. Opened in 1977, Grgich Hills employs 50 people and produces between 65k-70k cases annually with roughly 20% of total volume sold winery direct, 30% CA Wholesale, 10% Export, and the remainder via US Distributors.

### Business Challenge

A well-established producer of Napa Cabernet and Chardonnay, Grgich Hills had developed a very specific, proven, proprietary methodology for building and sustaining sales relationships. Their unique process involves hosting key contacts like large account buyers and wholesalers at the tasting rooms of their elegant Napa winery and following up the immersive experience with sales activity targeting those who would come to visit (as well as helping to identify those who should visit). Also important to Grgich Hills is their practice of selling direct within California as well as through the three-tier channel outside the Golden State.

In order to track these specialized sales activities - direct sales in CA and via market managers nationally – and with a mind towards improving the efficiency of their regular account calling activity, Grgich Hills implemented a well-regarded Customer Relationship Management (CRM) solution for more systematic capture and sharing of information across their sales organization.

Grgich sales leadership was satisfied with the overall functions their incumbent CRM solution provided, however, they needed the system to work for wine distribution, CA direct sales and to support the ability to measure important activities. Unfortunately, not all these features were available in the application prompting Grgich to engage a third-party vendor to build customizations to meet their specific needs. It was decided that Grgich Hills simply could not afford the time and expense involved in working with the recommended third-party vendor to build to their specific business

### HIGHLIGHTS

#### Customer

Grgich Hills  
Napa Valley, CA

#### Challenge

- Difficulty maximizing and sustaining relationships with key contacts via the customer's unique, immersive, on-site experience
- Duplicative efforts in managing three-tier sales nationally and direct sales in CA simultaneously in one application
- Incumbent solution lacking industry-specific language, measures and reporting

#### Solution

- Automation/codification of unique on-site marketing to wholesalers for greater metrics and accountability
- Activity tracking and BI tools to manage both three-tier and direct sales activities in a single location
- Robust reporting on industry-specific metrics like National Account Compliance, Over 365 days, Account Opportunities and others
- Product finder for more effective account segmentation

#### Results

- Increased visibility into distributor, restaurant and retail level activities as well as sales team activity
- More informed perspectives on the drivers of results in sales and marketing strategies and tactics
- Improved resource allocation across sales and marketing with full transparency into daily workloads
- Centralized data and records improved ease of transition during employee turnover
- Enhanced communication between stakeholders yielding better collaborative efforts
- Distributor depletions up 5% and CA Wholesale up 15% over last fiscal year

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requirements. It was taking too long, and sales leadership was spending too much time and money explaining their industry-specific language, measures, and reporting requirements.

Upon learning of GreatVines, it was an easy decision to change direction and adopt GreatVines. The GreatVines team came to the table with an innate understanding of wine industry terminology and could deploy enhanced systems much faster, saving both time and money.

## Solution

Implementing the GreatVines platform gave Grgich Hills the ability to codify their proven-effective process focusing on hosting buyers and wholesalers at their tasting room. GreatVines enabled easy recording of which buyers from wholesale accounts and other industry outlets had come to the winery/tasting room. GreatVines sent this important data back to the appropriate sales teams and distributors in the relevant markets, making it much more efficient and easy to effectively close the loop. Establishing relationships with entire organizations via brand-building Interactions became easier and more effective at increasing sales.

Grgich leveraged not only GreatVines' Activity Tracking functionality, but also embraced the suite of reporting and BI tools which was useful in measuring and managing the execution of their direct sales CA as well as their three-tier sales in other markets. The GreatVines solution delivered better reporting to more fully engage the team in finding sales; National Account Compliance, Over 365 days, Account Opportunities, etc. The winery also elected to use the GreatVines Mobile App – getting information directly and immediately into the hands of their sales staff on the go.

Yet another feature Grgich enthusiastically engaged was the website plugin product finder supporting more effective account segmentation. This tool helped Grgich to focus on the proverbial 20% of accounts from which 80% of volume would be derived. Focusing on the right markets helped Grgich Hills to build the most productive relationships.

## Results

Increased Visibility was probably the most significant result of the solution provided by GreatVines. Grgich reports their GreatVines implementation yielded better views into what is happening at the distributor, restaurant and retail levels, and their sales teams activity in relation to those accounts. Having this visibility provides Grgich Hills the opportunity to make better decisions and helps identify any unhealthy trends as well as positive trends. Moreover, increased visibility enables investigations to understand the 'why' behind the results of their sales and marketing strategies and tactics.

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“Measuring Activities has been particularly valuable to us,” said Grgich Director of Sales, Rebecca Geschwender. The GreatVines solution enables active tracking of account calls (interaction via in-person visits, phone calls, e-mails), events, e-mail campaigns, wait-staff training, and winery visits to determine which of these are most successful in achieving sales results. “This close tracking of the results enables us to have data-driven discussions about these activities and provides us with full transparency to daily work loads,” said Geschwender.

The centralized system GreatVines delivers for the storage of contacts, communications, and important documents minimizes the pain associated with employee turnover. It also provides controls to prevent redundancy and duplicated efforts among the multiple people from Grgich involved with important accounts. Managers at Grgich are enthusiastic about the ability to see where reps are spending time and where they might need help. Grgich accounting teams also utilize the communication system in GreatVines to provide sales representatives with important information on their accounts.

The proof of these benefits is reflected in the sales results for fiscal year 2018 wherein distributor depletion through June 2018 is up +5% vs. last fiscal year and the CA wholesale (General Market) is up +15% vs. last fiscal year.