## UNDERSTANDING YOUR CURRENT AUDIENCE

# THREE WAYS TO ACTIVATE THE CONSUMER SEGMENTATION TOOL

## STEP 1 - CHOOSE YOUR METHOD FOR SEGMENTATION

| CONVERSATION CLASSIFIER | POLL CLASSIFIER | SURVEY CLASSIFIER |
|---|---|---|
| Recommended for **new customers** signing up for your e-newsletter while in person at your winery. | Recommended for **existing contacts** in your database and to add to email welcome journeys. | Recommended for **Wine Club Members** or **high-purchase customers**. |
| **HOW TO** | | |

**Conversation Classifier**

Tasting hosts can classify their guests into a consumer segment by asking them a simple question in conversation. Depending on the answer, the tasting host can tag them in your POS system.

*What's the last wine you enjoyed at home?*

a.  a specific winery is mentioned
b.  a varietal or country of origin is mentioned
c.  an occasion/ companions are mentioned or not much to tell you.

*Is the wine…*

a.  something they were proud to drink
b.  a familiar favourite
c.  something they hadn't tried before

*Do they…*

a.  have a cellar or collection
b.  have no more than a bottle or two at home
c.  mention having enjoyed small bottles or canned wines

Mostly A = Passionate Advocate
Mostly B = Engaged Explorer
Mostly C = Social Sampler

**Poll Classifier**

Incorporate a simple poll into your next newsletter deployment, and newsletter welcome email, with the results generating a tag for each contact that answers.

*Tell us your ideal visit to wine country.*

a.  The 3-4 wineries I plan to visit have been on my radar for quality wines and experiences.

 I hope to try limited edition wines and discuss their winemaking with the host.

 Bonus: if I can tour the cellar, barrel room, or vineyard.

b.  I will go to 2 to 3 wineries, making sure to include our favourite where we know the host and buy the wines often.

 I prefer a knowledgeable host who can speak to the history of the winery/vineyard, and recommend other wineries to visit.

 Bonus: if there is a vineyard walk option or a restaurant to dine at.

c.  I will go to 2 wineries, maybe a brewery or distillery too.

 I enjoy lively conversations at the tasting bar and wines that fit my everyday budget.

 Bonus: if there is a food truck or a place to meet and sit with friends.

 A = Passionate Advocate
 B = Engaged Explorer
 C = Social Sampler

**Survey Classifier**

Put most important contacts through the highest accuracy segmentation tool—a full survey. This classifier uses logic rather than a linear discriminant analysis to segment the participant and is recommended to get the most accurate representation from your highest value customers.

Request access the WGBC classifier survey coding from info@winebc.com. The survey will appear in your Survey Monkey account. Customize the title/description of the survey as you wish but do not alter or add to the question list.

The logic is built so that each participant will be driven to a final question associated with their segment. When you export the results from survey monkey you can filter by the final question to pull the segments separately and upload the correct tags into your CRM system. A detailed guide with images and instructions will be provided to you when you request the survey classifier access.

Q9 EE = Engaged Explorer
Q10 PA = Passionate Advocate
Q11 SS = Social Sampler
Q12 CC = Comfortable Casual
Q13 VS = Value Seeker

*Note: this is the option that is highest in time and effort investment. It is recommended to use the poll classifier if capacity is limited. Your winery must have a Survey Monkey account to utilize.*



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## STEP 2 - SEGMENT YOUR AUDIENCE

- Add a 'Tag' in your Point of Sale for your staff to add easily to each guest they use the **Conversation Classi ier** with. Ideally your POS migrates the tag to your CRM system.

- Ensure responses to the **Poll Classi ier** result in tags to each consumers profile in your CRM platform. Launch one poll in your newsletter to your existing database and add to your welcome email to capture new contacts.

- Export the results from the **Survey Classi ier** to an excel and import the new tags to your CRM platform to be associated with the correct contact.

## STEP 3 - IMPLEMENT NEW TACTICS OR ADJUST MARKETING EFFORTS

- Example: Send a slightly different version of your e-newsletter to each segment. For Social Samplers, prioritize fun experiences and your entry tier wine specials. For engaged explorers prioritize a wine club event or opportunity. For passionate advocates offer exclusive access to a limited wine, or an education behind the scenes video.

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