

# Wine sales: Taking best practices from traditional to digital

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RA'ANANA, ISRAEL: How good wine reps make consistently good wine sales.

The [job of sales rep in the wine industry](#) may seem like a glamorous one, filled with the perks of wine tasting and food pairing, as well as the opportunity to travel extensively and meet new people regularly, but it also presents a unique set of challenges to the sales representative that, perhaps, more mainstream products don't.

While traditional wine sales techniques like offering tastings, knowing a little bit if not a lot about wine, and attention to seasonal wine market peaks are still key to generating a consistent sales quota, the introduction of automated systems and modern technology has definitely helped facilitate order taking and increase sales.

## Best practices for today's wine sales representative

### *Profile your clients*

It is important to get a good feel for whom your client is and create a client profile in your CRM application. To find out more about the type of clients you are working with, spend some time in their shop, and take note of a few things. Are they the kind of wine shop that really knows and cares about wine? How does the store operate? Are the clerks actively stocking the shelves and chatting with customers or do they just sit behind the cash register and seemingly know little about their product? When you have a good Customer Relationship Management (CRM) profile of your wine shop client, you can serve their needs in a much better capacity by determining which wines will best fit their needs. Many times specialty wine shops will cater to a more discerning clientele than a liquor or grocery store.

### *Surveys show what's up*

Create a quick and easy survey that you can process with your client while on site using your tablet CRM app; when you can sit with the client and ask your survey questions, you'll get a better feel for what they are selling, what their customers are saying and which products are not so popular. Sometimes discussions arise out of questions about the wine that can help you gain insight into what best serves your clients, and in turn, their clients.

### *Monitor inventory*

It has always been important to monitor your client's inventory as well as that of the wholesaler or distributor for which you work. The days of Excel spreadsheets, faxes and phone calls are long gone with a convenient [sales representative tablet and CRM app](#) in your hands.

You should always know what your client's inventory looks like; what they are carrying, what they are low on and what is not moving. This can help you pre-emptively follow up or assist so that they never run out of their best-sellers or, conversely, get stuck with overstock that no one wants.

Likewise, if the warehouse gets a big shipment in on a popular wine, you can offer them a special deal or let them know you've got plenty. Of course, the opposite also applies: If the warehouse is running low you can give them a heads-up with plenty of advanced notice so that they don't get caught short.

#### *Your presence is required*

As always, suiting up and showing up to your customer's store is an absolute must. If you only ever fax or email in a product list, your customer is not able to develop a relationship with you, nor are they able to "view" the wines you have available. Set reminders on your calendar and specifically in your buyer's profiles for when it's time to make a physical visit to the store.

#### *Gratitude goes a long way*

Just as your mother always said, you should always say "Thank you". Never forget to thank your clients for their business. A personal note, small gift, or phone call goes a very long way toward making the client feel appreciated. Set reminders in your client's CRM profile to follow up after every visit and sale, as well as for holidays or your buyer's birthday. Even if your client doesn't buy anything, it is still a good idea to follow up with a note thanking them for taking the time to meet with you.

Non-tech industries like wine sales can adopt newer tools and integrate them with the old school face-to-face approach to increase sales and provide better customer service.

## ABOUT OFER KFIR

Ofer Kfir loves to talk about technology & tools for sales people. Evangelist at WRNTY and the #1 user of SuperRep! Father, a professional skier and traveller.  
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