



# Pouring for Profit:

*Wine Sales and Marketing Techniques  
to Increase Beverage Revenue*

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# Agenda



- 1. Learning Objectives.**
- 2. Challenges we face today.**
- 3. Why sell wine?**
  - Outline the facts.
  - Answer the question.
  - Let's look at the numbers.
- 4. Four principles of selling wine with confidence.**
- 5. The “Big Six” Wine Consumers: Who they are & how to sell to them.**
- 6. Today's wine trend highlights.**
- 7. Creative wine marketing.**
- 8. Let's taste with Victoria!**


# Learning Objectives

During this session, attendees will learn to:

1. **Increase wine sales by learning how to translate current beverage trends into sales and creative beverage marketing and execution unique to their properties or event space.**
2. **Learn how to sell to today's 'Big Six' categories of consumers of beverage alcohol.**
3. **Overcome any fears about selling premium wine for catering and event sales while learning how to 'tell the story' of the Wagner Family and their wines.**



# Some of the challenges we face today...

1. Meeting the expectations of a new-age, more sophisticated customer.
  2. Increasing the average check.
  3. Creating a point of differentiation in a competitive market.
  4. Staying profitable while boosting the guest experience.
  5. Keeping your sales staff educated, motivated and excited to sell!
  6. Keeping your banquet and/or bar staff motivated & engaged.
- 

# Why sell wine?

Let's discuss...



**NACE Experience**  
Conference for Catering and Events

# Why sell wine?

## On average:

🍇 57% of total hotel beverage sales is generated in catering/banquets.

🍇 8 -10 % of total catering food and beverage revenue is beverage.

However, less than 30% of catering events include wine!

Why?...

🍇 Keep in mind that very few people know exactly what they want when booking a private event so..

1. Part of a catering/events manager's responsibility is to create an event that will *generate profits while providing a real and perceived value for the guest.*
2. Suggestive selling will *help increase profits through incremental sales while achieving trust and greater customer satisfaction.*
3. Adding wine to any event *enhances the guest experience.*

# Here is what it looks like:

WINE	BASE TIER	UPSELL
CHARDONNAY	HOUSE WINE	MER SOLEIL RESERVE CHARDONNAY
SERVING SIZE	5 oz.	5 oz.
NAP COST PER 750 ML	\$ 7.50	\$ 14.00
NAP COST PER OUNCE	\$ 0.30	\$ 0.55
AVG SELLING PRICE	\$ 50.00	\$ 75.00
PROFIT PER BOTTLE	\$ 42.50	\$ 61.00
PROFIT PER CASE	\$ 510.00	\$ 732.00
SELL 20 cases	\$ 10,200.00	\$ 14,640.00
<b>UPSELLING = \$ 222.00 ADDITIONAL PROFIT PER CASE! \$4440.00 ADDITIONAL PROFIT PER 20 CASES</b>		



# The Four Principles of Selling Wine With Confidence





# What are the Four Principles of Selling Wine?

1. Communicate what sets you apart.
2. Understand *who you're talking to* AND who they are *planning for*!
3. Change the way you think about wine!
4. Be Prepared by Being Proactive.



# 1. Communicate what sets you apart.

- 🍇 Be proud of your beverage program— talk about it!
- 🍇 Your beverage program partners are strong leaders in the industry and their commitment to your program guarantees quality and availability.
- 🍇 Make personal recommendations, communicate in a passionate manner.
- 🍇 Talk about the training & knowledge of your staff.
  - Continue the training and education within the company. Your reputation precedes you.

# 2. Understand *who you're talking to yet who they are planning for!*

- 🍇 Meeting, Wedding & Events planner?
- 🍇 Executive's assistant?
- 🍇 Mother/Father of the bride or groom?
- 🍇 Corporate CEO?
- 🍇 A Millennial?
- 🍇 Association or Non-profit?

### 3. Change the way you think about wine!

- 🍇 Go in to the 'sale' with wine in mind.
- 🍇 Think of wine as another 'must have' food course.
- 🍇 Include (2) price points in the proposal ready to sell.
- 🍇 Make it easy for the customer (& you): Be creative!

#### Example:

Average seated dinner check per person = \$95.00 ++

- House wine package proposal:

    Add \$11.00 for wine per person = \$106.00 ++ per person (Based on 1 ½ glasses per person average)

- Mid-tier upgrade:

    Add \$17.25 for wine per person = \$123.25 ++ per person

**EASY FOR YOU AND THE CUSTOMER!**

## 4. Be Prepared by Being Proactive

- 🍇 Make sure the sales team is familiar with the beverage program & brands.
- 🍇 Find the unique brand story and focus on telling that story!
- 🍇 Use the tools at your disposal: local suppliers &/or distributor reps can provide you with:
  - a. Tasting notes & education.
  - b. Food and wine pairing information.
  - c. Knowledge & data about the latest trends.
  - d. Assist with customer tastings/events, Wine Dinners and promotions.
- 🍇 Don't overwhelm yourself, learn two wines at a time.
- 🍇 Taste, taste, taste!
- 🍇 Build creative beverage solutions into your menus and include your creative beverage solutions in every proposal.
- 🍇 Pair food & wine in advance.
- 🍇 Take your wine list and add a one-line description of the wine to include a 'pairs with' suggestion.
- 🍇 Pair a white and a red wine with top-selling entrées and food stations on your menus.

# Let's look at the "Big Six" Wine Consumer Segments



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# The 'Big Six'

- 01. The Enthusiasts**  
Passionate about wine, do their research & share their discoveries!
- 02. The Image Seekers**  
Sophisticated, adventurous & trendy wine drinker.
- 03. The Savvy Shoppers**  
Seek great value wines & believe good wines do not need to cost a lot.

- 04. The Traditionalists**  
Want to know that the wine is from a well-known winery.
- 05. The Satisfied Sippers**  
Look for a sensible choice they feel comfortable serving family and/or friends.
- 06. The Overwhelmed!**  
The LARGEST group (23%).  
They need you!!

# Selling Wine to The 'Big Six'

01. The Enthusiasts  
Feed their ego (& knowledge).  
Give them the complete wine list.

02. The Image Seekers  
Pick trending and 'adventurous'  
wines from your wine list

03. The Savvy Shoppers  
They'll be happy with your  
house wine selections.

04. The Traditionalists  
Show traditional, well-  
known wines from your list.

05. The Satisfied Sippers  
Be proud of your core selections.

06. The Overwhelmed!  
You are the expert, use the tools  
at your disposal!

# Today's Wine Trend Highlights





# Today's trending event wine stations...

## 1. Wine and Food Pairing Stations

- Wine and Cheese Pairing
- Wine and Charcuterie Pairing
- Flight of reds at the BBQ or carving station
- Flight of whites & Rosé at a fresh seafood station: shrimp, oysters.
- Frozé (Frozen Rosé cocktails) station
- Champagne, Sparkling wine, Prosecco & Rosé at an Oyster station

## 2. International Wine Tasting Station

## 3. Flavored Sangria Station

## 4. Fresh Fruit Bellini Station: brunch, weddings, showers

## 5. Champagne/Sparkling wine Mimosa Station

# Today's Top Wine Category Trends

1. **Wines that tell a story: where are they from, who is the winemaker, the history of the winery, the family**
2. Sparkling wine and Champagne finally becomes an everyday beverage!
3. Rosé: Champagne, Sparkling wine and still
4. Single-serve wines: RTD Wine in a can! Premium offerings and labor-saving options.
  - ✦ Great for meeting breaks, event happy hours, receptions, poolside events, golf courses & any outdoor events.
5. 'Better-for-You' wines:
  - ✦ Low alcohol or 0% wines
  - ✦ Natural wine: wine with no added 'outside influence' (i.e. no added yeast, etc.)
  - ✦ Organic/sustainable (beer, wine and spirits)
6. Still trending for summer: Wine-based sangria/shared punches.
7. Premium Wine-on-Tap in outlets and catering: Because of the low waste and sustainability; less bottles
8. Pinot Noir and Red Blends remain popular
9. Non-traditional wine varietals i.e. Albariño from Spain, Malbec from Argentina

# Creative Beverage Marketing: WINE

- ❖ Conduct customer meetings in a **Wine-Friendly Environment**:
  - Set up the closing room with a wine display, framed winery posters, wine barrel, wine glasses etc.
- ❖ Always discuss wine and food together...
- ❖ Always taste wine and food together...
- ❖ Ask the chef and/or on-property “sommelier”/wine expert to be at the tasting...
- ❖ Your job has been made easy by: **Including popular wine brands...**
- ❖ Discuss the **financial benefits** of selling wine with your staff...
- ❖ **Educate** your staff and your customers about wine...
- ❖ Develop creative ways of **marketing wine that is unique to you..**

# Creative Beverage Marketing: WINE (Con't.)

- ❖ Showcase your awareness of current trends in events:
  - a. Offer a 'happy hour' package for meeting planners that include wines in a can, sustainable offerings, trending varietals, etc.
- ❖ Create a "wine and cheese package" as a "signature" or "Happy Hour" ending to a meeting.
- ❖ Create 3-4 course sample seasonal wine dinner packages with your chef offering a different wine with each course & priced inclusive, per person.
- ❖ Offer a beverage "incentive" to the client i.e. wine amenities for VIP's and negotiate a lower price per bottle for wine service at their event.
- ❖ Offer a premium wine-by-the-glass list at the bar.
- ❖ Create "wine tasting" stations at reception/station events by offering 2-3 white wines and 2-3 red wines specifically chosen to pair with the food stations.
- ❖ Offer two tiers of wines with entrée proposals and price as an inclusive package.

# Creative Beverage Marketing: WINE (con't.)

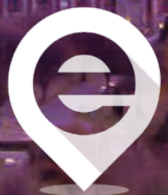
- ❖ Offer a champagne toast for ALL occasions and celebrations not just weddings. (i.e. end of a successful meeting, awards ceremony etc.)
- ❖ Offer a selection of wines at a cash bar by creating a menu card or table tent on the bar listing the selections. i.e., offer a Chardonnay, a Pinot Grigio or Sauvignon Blanc AND a Rosé or two tiers of Chardonnay; do the same with red wines.
- ❖ Create a signature Champagne Cocktail station.
- ❖ Offer custom labeled sparkling or still wine 187's to brides as their favors.
- ❖ Offer custom labeled wines for amenities for corporate VIP's.
- ❖ Present the event planner or bride with the "Mixed-to-Match" Champagne Cocktail concept to match their logo or color scheme of the bride-to-be.
- ❖ Consider adding 'Environmentally Friendly' wines to your program for the customer looking for a 'green event' or offer a 'Green' Bar Package.



**Let's taste!**

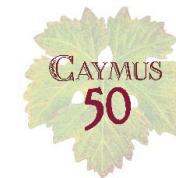
**CAYMUS**  
VINEYARDS

**Host:**  
**Victoria Logan**



**NACE Experience**  
Conference for Catering and Events

# The Wagner Family



*Chuck Wagner*

CAYMUS-SUISUN

CAYMUS  
VINEYARDS

**BONANZA**

Chuck founded Caymus Vineyards with his parents in 1972. He remains a farmer at heart – he can still be found in the vineyard and continues to experiment with farming techniques and other aspects of winemaking.



*Charlie Wagner*

CONUNDRUM

MER SOLEIL

*Sea Sun* · RED SCHOONER ·

Named after his grandfather, Charlie has followed in his namesake's footsteps, developing an early love for farming and winemaking. Today he says that he and the rest of the family are constantly "still learning."



*Jenny Wagner*

Emmolo

**The Walking Fool**

Hands-on in everything from growing the grapes to creating her labels, Jenny learned early on that a desk job wasn't for her. She inherited a love of farming along with an eagerness to get her hands dirty and try out new ideas.

# Wine Spectator



· RED SCHOONER ·  
‘VOYAGE’  
MALBEC | ARGENTINA



Wine Spectator  
**92**  
POINTS

“Elegant and pure, with an inlay of savory sage and peppery floral details, gaining richness and depth around a concentrated, juicy core of chocolate berry flavors. Reveals a twinge of fresh acidity that lifts the flavors, allowing them to spread out around fine tannins.”

– Aaron Ramano  
2023

**Emmolo**  
2021 Merlot  
Napa Valley



Wine Spectator  
**90**  
POINTS

“Lithe and sleek up front, revealing black cherry, spiced cinnamon and tomato leaf flavors, underlined by an increasingly tense structure as this approaches broad-shouldered tannins. Drink now through 2029.”

– Tim Fish  
2023

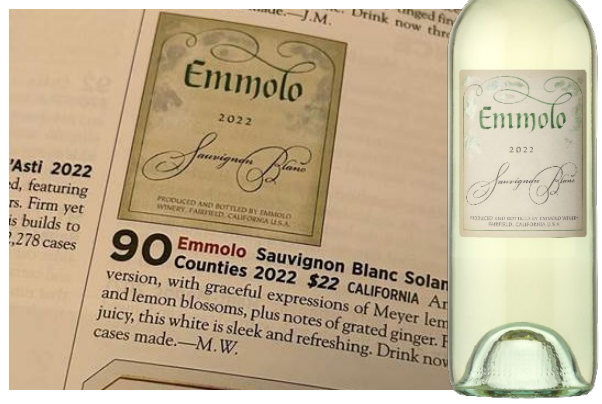


## The Chuck Wagner Interview: The Next Generation

In this exclusive interview, Wine Spectator editor and publisher Marvin R. Shanken talks to Napa wine legend Chuck Wagner about his children's role in growing the Caymus legacy. Read the full interview in the Nov. 15, 2023, issue of Wine Spectator.

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**MER SOLEIL 'RESERVE'  
CHARDONNAY  
MONTEREY COUNTY, CALIFORNIA**



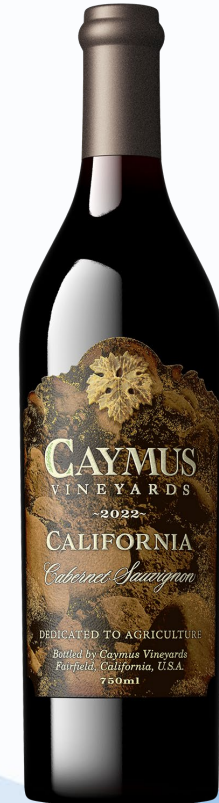
**NAP \$14.00**

**SEA SUN  
PINOT NOIR  
CALIFORNIA**



**NAP \$10.00**

**CAYMUS VINEYARDS  
CABERNET SAUVIGNON  
CALIFORNIA**



**NAP \$30.00**



“As a winemaker, you can really leave your imprint on Chardonnay - I love making this wine and could not be more excited about what’s to come.”

*Charlie Wagner*

30  
CELEBRATING YEARS OF  
MER SOLEIL  
RESERVE CHARDONNAY



### WINEMAKER

Made by winemaker Charlie Wagner of Caymus Vineyards, who first started making Chardonnay while in high school and has been endlessly fascinated by this varietal ever since.



### STYLE

Bold yet fresh. Over the years this wine has become leaner – its citrus notes and vibrant natural acidity can be traced to the region’s cooling gusting wind and longer growing season.



### VINEYARDS

Originally sourced from the Santa Lucia Highlands and now expanding to a broader stretch of Monterey County, whose diversity and micro-climates enable an even more layered wine.



### TASTING NOTES

Layered aromas and flavors. Hints of citrus on the nose, with brown spice and honeysuckle. Round and creamy, featuring notes of lemon squares and baked croissant. A refreshing, clean finish.

## BUILDING ON MARKET SUCCESS

Top 5 Chardonnay over \$20 • Top 5 Chardonnay over \$20 with highest Eq. Vol. growth • Mer Soleil is a Top 10 Chardonnay brand over \$15

TTL US Food 52 weeks ending 8.20.23



# Sea Sun

## 2021 PINOT NOIR | CALIFORNIA

**Nose:** Chai, fresh berry basket, a hint of chocolate truffle and forest floor.

**Palate:** Brown spice, fresh blackberry and toasted bread.

**Style differentiator:** Bright and fruit-driven, with lush cherries and a strikingly soft texture. Try chilled to enhance this wine's silky smoothness.

**Vineyards:** Sourced from premier coastal regions of California. Exact sourcing shifts vintage to vintage, allowing flexibility each year. This vintage comes from Monterey and San Benito Counties.

**Farming notes:** Cooling breezes off the Pacific Ocean balance the sun. This temperate environment shields Pinot's delicate skin, allowing grapes to stay on the vine longer for enhanced flavor and character.

**Aging:** Lightly aged in a combination of new and neutral French oak for a toasty character and bright fruit.

**Suggested food pairings from winemaker Charlie Wagner:** Cacio e pepe, carnitas tacos, spicy grilled shrimp or wild mushroom risotto.

*"California is a beautiful sight and beautiful place. I like to think its unique character can be found in a glass."*

*- Charlie Wagner, owner and winemaker*

# CALIFORNIA

**CAYMUS**  
VINEYARDS



“I feel this wine expresses the greatness of California and its hidden pockets where Cabernet can excel. The cold Pacific Ocean running the entire length of the state presents maritime influences – and with each small distance eastward the climate warms. Stony soils, south facing slopes and moderately warm conditions are the keys to producing dark, rich and good tasting Cabernet.”

*Chuck Wagner* owner/winemaker

## BACKGROUND

Caymus has been producing Napa Valley Cabernet Sauvignon since 1972. In the decades since, we have learned a great deal about the conditions that enable production of this varietal. These conditions can be found in other parts of California.

## SOURCING

Places from Paso Robles to lesser-known areas in Lake, Monterey and San Benito Counties can produce great Cab. We search for special pockets of land in CA with warm days and cool nights, whose rocky soils mean that vines struggle, thus producing rich, concentrated wine.

## STYLE

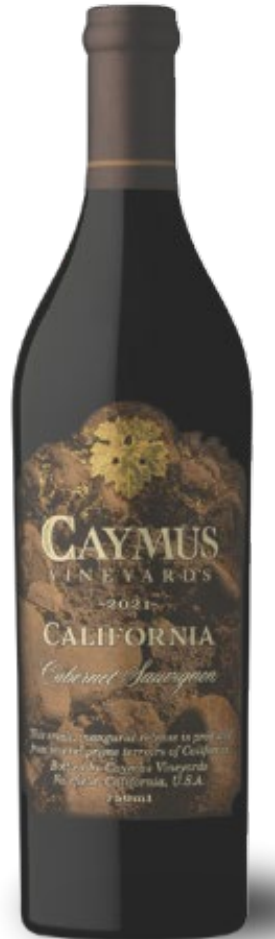
Since the early days of Caymus, we have worked to create a signature style of Cabernet – dark and lush, with ripe fruit and luxurious tannins, drinkable upon release or with age. This wine displays the Caymus character.

We envision a “lifting up” of both growers and communities that have not been in the spotlight. Caymus began in Napa Valley, and that will always be our home. However, there is much to be excited about in a broader stretch of California.

Just as Napa came from obscurity to command attention, so may other parts of the state. This wine reflects optimism about how much remains to be explored and cultivated in the world of fine winemaking.



*You can also find this  
QR code on the back label*



# Your Opinion Matters!

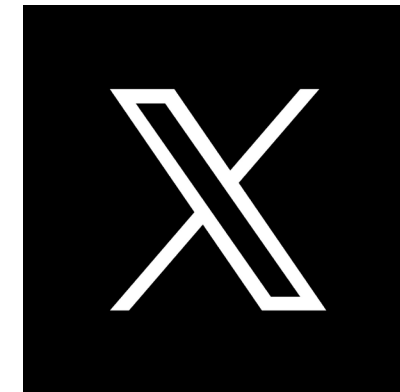
Please complete the education  
evaluation for **EVERY** session  
you attend!

*Thank you!*



# Continue the Conversation

#NACEEXP24



# **ADDENDUM**

# Wine Focused Creative Catering Beverage Stations and 'Look Book'





# Why Creative Catering Beverage Stations?.....



## Turn your catering operation into a showcase for beverage trends:

1. Enhance your customer's overall experience.
2. Provides guest and bartender interaction.
3. Reinforces your commitment to quality & creativity.
4. Stimulates new business and increases guest frequency.
5. Increases check average and profits.
6. Enhances your reputation for being unique.
7. Feeds the ego of today's consumer who needs to feel special.
8. Creative cocktail sales are on a consistent rise.
9. All the popular and "life-style" media are addressing specialty cocktails and pairings.

**Creative Beverage Stations will stimulate interest,  
increase sales and create word of mouth endorsements!**

# Wine and Cheese Pairing Station



# Frozé Station – Rosé & Frozen Rosé pairings

## ROSÉ: COLORS, FLAVOURS AND PAIRING



LIGHT AND MINERALLY

### PAIRING

The most versatile of all rosé styles. Great with everything from salad with goat cheese to juicy burgers

MINT  
GRAPEFRUIT  
STRAWBERRY



LIGHT MEDIUM AND FLOREAL

### PAIRING

The Floreal and herbal notes make this ideal with rustic, grilled dishes like grilled shellfish, mediterranean lamb and pork

CHERRY  
ROSE PETAL  
HERBS



MEDIUM, FULL AND ROUND

### PAIRING

Herbed grilled chicken and pork, cold summer salads and grilled veggies pair

RASPBERRY  
HIBISCUS  
WHITE PEPPER



FULL, RICH AND SAVORY

### PAIRING

This wine screams for bbq sauced anything. Grilled ribeye and pepperoni pizza too

DARK BERRY JAM  
BELL PEPPER  
BLACK PEPPER



# Sangria Ideas



# Food and Wine Pairing



# 'Build-your-own': Bellini Bar



# Sparkling Wine Cocktails





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