

## Onboarding for DTC Success

WineDirect's onboarding team will guide you as you configure and launch your new website, online store, wine club and point of sale (POS). Your dedicated, in-house specialist will work closely with you to get you up and running quickly, and ensure you are set up for long term success. Here is a sample onboarding plan that will be adjusted according to your winery's priorities and needs.

Onboarding consists of three primary components:

- **Setup Tasks:** These are actions your team will need to take to get your website, online store, club and point of sale up and running.
- **Group Trainings:** Virtual group sessions hosted by WineDirect experts where we'll show you how to make the most of our tools.
- **Custom Training Sessions:** 1x1 virtual meetings where your in-house specialist will walk through specific procedures and processes tailored to your winery's needs.

### WEEKS 1-3: THE BASICS

#### Setup Tasks

- Choose your template and begin website design
- Add wines (and other products) to your store
- Set up inventory pools in all your locations
- Review contact profiles and contact types
- Set up your wine club tiers
- Enable relevant integrations:
  - ShipCompliant
  - Fulfillment
  - WineDirect Payments
  - Tock (reservations)
- Configure your shipping profiles including pricing and state licensing

# WINE DIRECT

THE WINERY'S CHAMPION

WINEDIRECT.COM

## WEEKS 4-5: PROMOS, PRODUCTS & POS

### Setup Tasks:

- Set up your POS and order hardware
- Configure marketing tools including promo codes
- Review club memberships and how to process clubs
- Learn to create system emails and email documents

### Group training:

- Get to Know Your Dashboard, Store and Settings

## WEEKS 6-8: DATA IMPORTS & CUSTOM TRAINING SESSIONS

### Group Trainings:

- Processing Your Wine Club
- Managing and Using the POS

### Custom Training Sessions:

- **Tasting Room:** Configure your POS and map out your new tasting room procedures.
- **Accounting & Reports:** Review reporting tools and learn how to generate the reports your winery needs for accounting and business tracking.
- **Marketing Tools:** Implement our built-in up and cross-selling tools and learn how to segment your contact list for more effective email marketing.

### Setup Tasks:

- Import club members, contacts, and inventory
- Final Quality Assurance (QA) & testing

### Launch Day!

## WEEKS 8+

### Custom Training Session

- **Wine Club:** Set up your wine club and learn how to seamlessly process club runs. (Scheduled at your convenience after you launch.)
  - Review club structure and setup
  - Set up club emails
  - Double check product SKUs, inventory and compliance
  - We'll be there with you to process your first club when you're ready!