



Phone Sales Campaign & Scripts

Tracking and Managing Phone Sales in OrderPort

Easy Intro Starting Lines

- “Hi [First Name], this is [Your Name] with [Winery Name]. How are you doing today?”
→ *Simple, friendly, and great for any call type.*
- “Hi [First Name], this is [Your Name] calling from [Winery Name]. I just wanted to thank you for being part of our club and check in to see how you’ve been enjoying your wines.”
→ *Warm intro for club members.*
- “Hey [First Name], it’s [Your Name] with [Winery Name]. We’ve been talking to some of our members this week about [featured wine or upcoming event], and I thought of you.”
→ *Feels personal and purposeful.*
- “Hi [First Name], this is [Your Name] with [Winery Name]. I was reviewing your account and noticed you enjoyed our [wine name] last release—I’d love to share what’s new from that vineyard.”
→ *Data-driven but still natural.*
- “Hi [First Name], this is [Your Name] calling from [Winery Name]. We’re calling a few of our members ahead of the holidays to share some special offers and say thank you for your support this year.”
→ *Perfect seasonal intro.*
- “Hey [First Name], it’s [Your Name] with [Winery Name]. I just wanted to give you a quick call to say hi and let you know about a few fun things happening at the winery this month.”
→ *Light, friendly, easygoing tone.*
- “Hi [First Name], this is [Your Name] with [Winery Name]. I wanted to reach out because we’ve got a few new releases I think you’d love based on your past orders.”
→ *Great for reorder or release campaigns.*
- “Hi [First Name], [Your Name] here with [Winery Name]. We’re running a special offer for our long-time members this week, and I didn’t want you to miss out.”
→ *Works well for urgency or thank-you campaigns.*
- “Hey [First Name], it’s [Your Name] from [Winery Name]. We’re checking in with our club members before the next shipment to see if you’d like to add anything extra to your order.”
→ *Smooth transition into an upsell or add-on conversation.*
- “Hi [First Name], this is [Your Name] with [Winery Name]. Welcome to the club! I just wanted to personally say hello and tell you about a few of the perks you can enjoy right away.”
→ *Perfect for new-member outreach.*

Phone Sales Campaign Ideas

Low Inventory Alert

- “Your favorite wine from last vintage is almost gone—we’re down to just a few cases and I wanted to make sure you didn’t miss out.”
- Creates gentle urgency without pressure.
- Works perfectly for varietal-specific or collector buyers.

Library Wine Highlight

- “Our winemaker has been tasting through the library, and the 2016 Cabernet is showing beautifully right now. We thought of our long-term members first while a few cases are still available.”
- Adds exclusivity and deepens loyalty.
- Great for longtime club members or higher-tier customers.

Top-Member Thank-You Offer

- “We’re thanking our top members this month with free shipping on 6 bottles or more, and we’ve built a few fun mixed packs to make it easy.”
- Ideal for year-end gratitude calls or milestone months.
- Perfect for reinforcing loyalty and boosting club value.

Seasonal or Gift Campaign

- “We’ve created some limited holiday 3-packs and 6-packs—perfect for gifting or hosting. Want me to share what’s in them?”
- Ideal for November–December campaigns.
- Pair with RedChirp or email for easy follow-up.

Winemaker’s Favorite Release

- “Our winemaker has been so excited about this new release—it’s tasting incredible already. We wanted to give our members a first chance before it’s released online.”
- Builds anticipation and makes the member feel like an insider.
- Perfect for small-lot releases or upcoming club features.

New Member Welcome Offer

“Welcome to the club! We’re reaching out to new members and offering a special library release pack so you can see how our wines age. It’s a great way to experience our older vintages and decide what you might want to lay down for the future.”

- Perfect for welcoming new members within their first 30 days.
- Adds perceived value and deepens connection early on.

Event Tie-In

“Hi [First Name], it’s [Your Name] with [Winery]. We have our upcoming [event name] next month, and we’re featuring a few of the wines that will be poured there. I thought you might like early access before the event crowd grabs them.”

- Excellent for release parties, winemaker dinners, and regional festivals.
- Builds excitement and connection around in-person experiences.

Phone Sales Call Flow Framework

Intro → Connect → Review → Offer → Handle Response → Wrap Up → Notes/Follow Up

1. Intro – Start Warm and Personal

Goal: Break the ice and make the member feel valued.

Example lines:

- “Hi [First Name], this is [Your Name] with [Winery Name]. How are you today?”
- “Hey [First Name], I just wanted to say thanks for being part of our club and check in to see how you’ve been enjoying your wines.”

2. Connect – Build Rapport

Goal: Chat casually and gather small details that make the conversation real.

Tips:

- Ask about their day, recent wines they’ve opened, or upcoming plans.
- Keep it conversational—this is relationship-building, not telemarketing.

Example:

- “Did you get a chance to open your fall shipment yet?”
- “Are you hosting any holiday dinners this year?”

3. Review – Personalize the Conversation

Goal: Reference their account or purchase history to show you know them.

Tips:

- Check for unshipped orders, favorites, or upcoming club shipments.
- Mention anything specific they’ve purchased or enjoyed.

Example:

- “I noticed you’ve loved our Syrah the last few vintages—it’s tasting amazing right now.”
- “You’ve got a shipment still waiting here; if you add a few bottles, I can offer free shipping.”

4. Offer – Present the Opportunity

Goal: Transition smoothly into your campaign or sale idea.

Tips:

- Be confident, friendly, and conversational—not pushy
- Always explain why this call matters to them (exclusive, early access, small lot, free shipping, etc.).

Example:

- “We’re offering an additional club pack this month with free shipping if you’d like to restock your favorites.”
- “We have a few cases of your favorite Pinot left, and I wanted to make sure you didn’t miss out.”

5. Handle Responses – Stay Positive

Goal: Keep the relationship warm whether they buy or not.

If yes:

- Confirm order details and shipping preferences.

If no:

- Share a light teaser about what's next—new releases, events, etc.

Example:

- “No worries at all! Just wanted to wish you a happy holiday season and thank you for supporting us.”

6. Wrap Up – End on Gratitude

Goal: Leave a positive, memorable impression.

Example:

- “Thanks again for your time today, [First Name]. We’re so grateful to have you as part of the winery family.”
- “Enjoy the rest of your week—and open something great tonight!”

7. Notes & Follow Up – Capture the Details

Goal: Keep the relationship going.

Tips:

- Log key takeaways: trip plans, favorite wines, family updates.
- Use notes for future calls, emails, or thank-you cards.

Example:

- “Heading to Europe for the holidays—mention this on next call.”
- “Loved 2019 Cab—flag for next release.”