



# BOISSET *Collection*

INDEPENDENT AMBASSADOR  
CUSTOMER FOLLOW-UP  
GUIDE



YOUR GUIDE TO

# CUSTOMER FOLLOW-UP

Once your customers experience the quality of Boisset wines and the great customer service you provide by staying in consistent contact with valuable communications, you'll begin to see your monthly re-orders and bookings grow.

- Reach out to your customers at least once per month by sending individual messages or by phone.
- It's always helpful to check in after a new customer receives their first order, after customers receive a sale email from Boisset corporate, or to make wine recommendations.





## REACH OUT AFTER 1<sup>ST</sup> ORDER IS...

*Received*

- Call each customer one to two weeks after they place their first wine order.
- Review their order form before reaching out.
- Check in to be sure everything arrived okay, they like their wine, and **if it makes sense for the customer**, mention the benefits of joining Wine Society or hosting their own tasting.

## VOICEMAIL

“Hi [Name], It’s [Your Name] with Boisset! I know you received your wine order recently and I’m checking in to be sure everything arrived okay and of course, I’d love to hear how you like your wines! You can reach me at [Your Number]. I hope to hear from you soon!”

## PHONE CONVERSATION

“Hi [Name], It’s [Your Name] from Boisset! How are you? **(chat for a minute)**

I wanted to check in to be sure all of your wines arrived okay. Did you get everything? Have you been enjoying the wine? Which is your favorite? Since that’s your favorite, I bet you would also really like **(mention additional wines that are similar to their favorite)**.

I also wanted to remind you that I consider myself to be your personal wine concierge. So, if questions ever come to mind - if you want some wine recommendations or you need help placing an order - please feel free to reach out to me anytime!”

### IF IT MAKES SENSE FOR THE CUSTOMER:

#### Mention Wine Society

“I can tell that you love our wine and it might really benefit you to look into our Wine Society Membership. It’s unique because you can customize every shipment if you’d like. You’ll also get 20% off every order and the minimum is just 3 bottles a quarter – that’s only 1 bottle a month throughout the year. Plus, you’ll get additional exclusive discounts up to 30% off when we have sales. Is this something you’d be interested in?”

#### Mention Hosting a Tasting

“I also want to mention that I think you’re someone who would enjoy hosting a Boisset Tasting Experience because you love our wine so much. It’s really easy and fun! All we need to do is pick a date and you can invite friends from across the country to a Virtual Tasting online. **(Only if they live local)** The other option is to invite some local friends over to your place for a casual get together. I’ll take everyone through a guided tasting experience with several different high-quality wines so they can sip, learn about wine, and socialize. It’s a great reason to get some friends together or to add an engaging activity to an upcoming birthday party, anniversary party, team happy hour at the workplace, or really any occasion! Would you be open to hosting a fun tasting?”



REACH OUT DURING...

*Boisset Sales*

- Boisset sends email announcements directly to all customers periodically, announcing sales and new product launches.
- You will **increase** re-orders by following up with each of your customers individually within 48 hours from when corporate emails are sent. Why? Because most people do not pay attention to mass emails – **however, they will pay attention to your personal reach out.**
- Choose the communication method you think is best for each customer – individual text, email, social media message, or phone call.

EXAMPLE EMAIL SENT FROM BOISSET HOME OFFICE TO ALL CUSTOMERS:

PRESIDENTS' DAY  
SITEWIDE SALE  
ENJOY UP TO 30% SAVINGS  
*With Shipping Included On Orders Of \$150 or More!*

START SAVING >>

Members Receive 30% Savings  
Non-Members Receive 10% - 20% Savings\*  
Ground Shipping Included On Orders Over \$150 Sitewide!

Please use coupon code: **PRESIDENT20** at checkout

*Not a Member? [Join Today](#)*

Coupon code "PRESIDENT20" must be entered and savings will be applied at checkout.  
Members save 30% & non-Members save 10% sitewide during our Presidents' Day promotion. \*Non-Members will receive up to 20% with the purchase of 12 or more mixed bottles! Offer cannot be combined with any other Boisset promotion. Shipping offer applies only to Ground shipping and is not valid on shipments to AK or HI. Please note that any imported wines cannot be legally shipped to: GA, IA, IL, IN, LA, ME, MI, MO, MT, SD, VA or WV. Offer starts Thursday 02.13.20 & expires Monday 02.17.20 at 11:59PM PT.



REACH OUT DURING...

*Boisset Sales*

## INDIVIDUAL EMAIL, TEXT, OR SOCIAL MEDIA MESSAGE

**EMAIL SUBJECT LINE:** Did you see the sale?

Hi [Customer First Name],

I wanted to let you know that Boisset recently announced our President's Day Sale. It goes until [Date sale ends] and I've picked out some wines that I think you would really enjoy **(include wine links to your personal website that they might like based on their past order history)**. Plus, you can get free shipping with an order over \$150!

I want to be sure you get to take advantage of the sale savings if you have an interest. Do you have any questions I can answer?

## VOICEMAIL

"Hi [Customer First Name],

It's [Your Name] from Boisset! I'm calling to say hello and to be sure you saw the announcement of our President's Day Sale that goes until [Date sale ends]. I've picked out a few wines that I think you would really enjoy. Feel free to give me a call back if you'd like to chat about them. I'll also send you a text with some links to the wines I think you'll like. I hope to hear from you!"

### **IMMEDIATELY SEND TEXT**

Hi [Customer First Name], here are the wines I mentioned in my voicemail that I think you'll really like! **(include wine links to your personal website that they might like based on their past order history)** I want to be sure you get to take advantage of our President's Day sale savings that end on [Date sale ends] if you have an interest. Do you have any questions I can answer?



REACH OUT DURING...

*Boisset Sales*

## PHONE CONVERSATION

“Hi [Customer First Name], it’s [Your Name] from Boisset!

**(chat for a minute)**

I’m calling to be sure you saw the announcement of our President’s Day Sale that goes until [Date sale ends]. I’ve picked out a few wines that I think you would really enjoy because I’d like to see you take advantage of the sale discount. Those wines are **(name the specific wines you’ve picked, explain a few details, and ask if they’d like you to place an order for them)**.

**IF IT MAKES SENSE FOR THE CUSTOMER...**

**Mention Wine Society**

“I can tell that you love our wine and it might really benefit you to consider joining our Wine Society. It’s unique because you can customize every shipment if you’d like. You’ll also get 20% off every order and the minimum is just 3 bottles a quarter – that’s only 1 bottle a month throughout the year. Plus, you’ll get free shipping on any order over \$150 and additional exclusive discounts up to 30% off when we have sales. Is this something you’d be interested in?”

**Mention Hosting a Tasting**

“I also want to mention that I think you’re someone who would enjoy hosting a Boisset Tasting Experience because you love our wine so much. It’s really easy and fun! All we need to do is pick a date and you can invite friends from across the country to a Virtual Tasting online. **(Only if they live local)** **The other option is to invite some local friends over to your place for a casual get together.** I’ll take everyone through a guided tasting experience with several different high-quality wines so they can sip, learn about wine, and socialize. It’s a great reason to get some friends together or to add an engaging activity to an upcoming birthday party, anniversary party, team happy hour at the workplace, or really any occasion! Would you be open to hosting a fun tasting?”



## REACH OUT TO YOUR WINE SOCIETY ...

*Members*

- Review your Wine Society orders and contact people who are scheduled to receive an upcoming curated shipment (meaning those featuring the pre-selected wines chosen by Boisset).
- Ask if they want the curated shipment or prefer to customize their order and make some recommendations – the objective is to start a conversation about upcoming wine needs or to get them shopping on your website.
- Wine Society Members are great people to ask about hosting a tasting but this works best through a phone conversation.

### INDIVIDUAL TEXT, EMAIL, OR SOCIAL MEDIA MESSAGE

**EMAIL SUBJECT LINE:** Your Upcoming Wine Shipment

Hi [Customer First Name],

[Your First Name] here from Boisset! I see that your next wine shipment is scheduled for [Date] and I wanted to ask if you would like to receive the curated selection or if you'd prefer to customize this order? I've got some great recommendations that I think you would really enjoy! Here are my suggestions **(include wine links to your personal website that you recommend based on their past order history)**. Just let me know if you have any questions after you take a look.

### VOICEMAIL

"Hi [Customer First Name],

It's [Your Name] from Boisset! I see that your next wine shipment is scheduled for [Date]. I wanted to say hello and ask if you would like to receive the curated order or if you would like to customize this order. I've got some great recommendations that I think you would really enjoy! Feel free to give me a call back if you'd like to chat about them. I'll also send you a text with some links to the wines I think you'll like. I hope to hear from you!"

**IMMEDIATELY SEND TEXT**

Hi [Customer First Name], here are the wines I mentioned in my voicemail that I think you'll really like! **(include wine links to your personal website that you recommend based on their past order history)** Just let me know if you have any questions after you take a look.



# REACH OUT TO YOUR WINE SOCIETY ...

*Members*

## PHONE CONVERSATION

“Hi [Name], It’s [Your Name] from Boisset! How are you? **(chat for a minute)**

I’m calling because I see that your next wine shipment is scheduled for [Date]. Our curated selection of our pre-selected wines will ship to you unless you’d like to customize this order. I’ve picked out a few wines that I think you would really enjoy **(mention wines that you recommend based on their past order history)**. Would you like me to customize the order for you?

### **IF IT MAKES SENSE FOR THE CUSTOMER...**

“I can tell that you love our wine and it might really benefit you to look into our Wine Society Membership. It’s unique because you can customize every shipment if you’d like. You’ll also get 20% off every order and the minimum is just 3 bottles a quarter - that’s only 1 bottle a month throughout the year. Plus, you’ll get additional exclusive discounts up to 30% off when we have sales. Is this something you’d be interested in?”

### **Mention Hosting a Tasting**

“I also want to mention that I think you’re someone who would enjoy hosting a Boisset Tasting Experience because you love our wine so much. It’s really easy and fun! All we need to do is pick a date and you can invite friends from across the country to a Virtual Tasting online. **(Only if they live local)** *The other option is to invite some local friends over to your place for a casual get together.* I’ll take everyone through a guided tasting experience with several different high-quality wines so they can sip, learn about wine, and socialize. It’s a great reason to get some friends together or to add an engaging activity to an upcoming birthday party, anniversary party, team happy hour at the workplace, or really any occasion! Would you be open to hosting a fun tasting?”





**BOISSET**  
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