



BOISSET *Collection*

INDEPENDENT AMBASSADOR
GUIDE TO PLANNING
VIRTUAL TASTINGS





BEFORE YOU BEGIN CHOOSE YOUR PLATFORM

Once you decide to lead a virtual tasting, step one is to decide where and how you want to host it.

We recommend hosting a private videoconference. There are a number of these services available, some free and some with paid “upgrades” to their functionality. Most share the same basic features where participants can see and speak to each other.

Many people already have a preference, or even an existing account of some kind – whether they use a Zoom account for work or just have a Skype account for keeping in touch with friends. If you use a VOIP service for your phone plan, like RingCentral, there may be built-in group calling features that would meet your needs for virtual tastings.

If not, we recommend going with one of these services:

- **ZOOM**
- **WEBEX**
- **SKYPE**
- **GOOGLE MEET (PAID G SUITE VERSION OF GOOGLE HANGOUTS)**

Each of them has its own pros and cons. Zoom, Skype and WebEx have free introductory levels, but all of the free options have a downside of some kind, whether in limited features offered or less than ideal guest experience. More **professional business-oriented options have a monthly fee**, typically in the \$6 to \$15 per month range. Only you can decide which platform is best for you, but be sure to use a service that includes an option for **screen-sharing**, so you can use slide presentations and show pages on your website.

If you need help in picking an online platform, you can find additional guidance in your Ambassador Resource Center.

Starting from your Ambassador Dashboard, first click to open the Resource Center where advance training material is located, then select “Recorded Training Calls” at bottom right. Next open the bundle titled **“Trainings on Virtual Tastings”**.

There you will find both a training video and supporting pdf called **”Learn to Videoconference Like a Pro”** from our “Learn with Marnie” series, which also includes helpful tips on whether to use a laptop or mobile phone and recommendations for how to set up flattering lighting and framing.



TECH & VIDEO *Tips*

Not tech savvy? Nervous about leading a virtual tasting?

Here are some tips to help your foray into the digital realm go smoothly:

- **Choose a quiet location where you will be able to control light and sound.** Avoid having light sources or reflective surfaces behind you and consider placing books or a riser to lift your screen and camera to eye level for a more flattering angle.
- **Laptops work better than phones or tablets.** Not only do you want a larger display and keyboard for controlling the videoconference, but it's helpful to have more ports for USB and ethernet.
- **Consider investing in an external webcam to improve your video and audio quality.** These are inexpensive, connect via USB and can significantly improve your picture and sound quality.
- **Go wired, not wireless, if at all possible and check your speed.** Connecting via ethernet cable is better than wifi for video quality. (If you don't have a port, adapters are available.) You'll have best results with the fastest connection, of course. For professional quality, we recommend at least 5-8 Mbps in download speed and 1-1.5 Mbps in upload speed. You can use this link to measure your speeds: <https://www.speedtest.net/>
- **Use the internet to learn internet tricks of the trade.** Whichever platform you plan to use for your event, whether it be Zoom, Facebook, Google, etc... search for "how to" training videos on Google or YouTube first to make sure you understand all the features and controls.
- **Practice makes perfect.** It's a great idea to do a test run with a friend before your first event to check how things look, to find and test the controls for sharing screens, muting, etc... It'll help you feel calm, comfortable and in control for the real event!



VIRTUAL EVENT

Planning

ORGANIZING THE VIRTUAL TASTING:

- **Choose a date and time, and select which of our “3-Bottle Virtual Tasting Experiences” to showcase.** Keep your intended audience’s preferences in mind for your own events, or discuss the options with your “host” if this event is being planned by a customer. You’ll find the flight options on your website, by selecting “Tasting Experiences” under the “Tasting” tab, or by reviewing the “Current Experiences” document linked near the bottom of the weekly Ambassador Buzz newsletter.
- **Invite your guests or assist the host in crafting their invitations.** You’ll find sample invitation templates in pages 5-7. A customer-facing “Virtual Event planner” is also available for sharing with hosting customers, linked above the “Planning and Leading Virtual Tastings” video in the Ambassador Academy page of your website (linked under “My Office”). Be sure to provide a means to RSVP, your contact info for questions and include the link to your website for purchasing the wines.
- **Re-send your invitation or a reminder to those who have not registered as you approach the cut-off date for ground shipping in their area.** And, of course, don’t forget to order YOUR OWN flight with plenty of lead time in case of delays!
- **Prioritize more attendance over more purchases.** Inevitably, some people will miss the deadline to order or decline to participate based on reluctance to purchase the wines. Consider reaching out to these folks and extending a personal invitation to participate even if they don’t have the right wine in their glass. They may need to see how much fun a virtual tasting can be to consider ordering the wine to participate fully next time. Besides, the more people you have, the more fun the event will be!
- **When people RSVP, send a confirmation email with the videoconference link and basic set-up instructions.** Use the confirmation email template provided on page 8, which spells out essentials like chilling white wines in advance, preparing glassware and recommending cheeses to have on hand as snacks. Be sure to monitor each order and tracking to ensure the wine shipments will arrive in time.
- **The day before your virtual tasting, you’ll want to send out a final reminder to those who are registered using the template below.** Make sure this includes the link for joining the videoconference and add any specifics that are unique to your event.

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SAMPLE INVITATION *Templates*

We recommend sending a personalized email, or creating an electronic invitation from one of the following websites along with a group Facebook post.

- Evite.com
- Paperlesspost.com

SAMPLE EMAIL INVITATION - AMBASSADOR SELF-HOSTED TASTING

Hi everyone,

I'd love to have you join me/us for a guided "virtual" wine tasting experience on **[Date]** at **[Time]**! I'll be featuring a flight of three of the exceptional wines from the award-winning wineries of the Boisset Collection that I represent as a Boisset Ambassador, which should take less than one hour. I'm so excited to share these exclusive wines with you all, special bottlings that are normally only available for sampling at the wineries!

I hope you can join in since it's so much fun to get together online! We'll connect over glasses of the same wines, and learn a little too! I will be leading our guided tasting, giving you a taste of the wine country tasting room experience from the comfort of home

The flight I've chosen for our gathering is one of my favorites, and as a special treat, it comes with a **[product credit value]** product credit that you can apply to your next Boisset purchase:

[link to your flight and include one of the descriptive sentences from the product page].

Please RSVP so we can arrange for your wine order, and if you have any questions about the wines, about how to participate or about shipping or redeeming your product credits, let me know!

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SAMPLE INVITATION *Templates*

SAMPLE EMAIL INVITATION - CUSTOMER-HOSTED TASTING (Casual event where each participant is purchasing their own flight)

Hi everyone,

I'd love to have you join me/us for a guided "virtual" wine tasting experience, featuring a flight of 3 exceptional wines from the award-winning wineries of the Boisset Collection on [Date] at [Time]!

We will be coming together online to connect over glasses of the same wines, to learn a little and have a lot of fun! Our Boisset Ambassador [Ambassador's name] will be leading our guided tasting, which should take less than one hour, giving us a sample of the wine country tasting room experience from the comfort of home! I'm excited to try these exclusive wines, that are normally only available for sampling at the wineries!

The flight we've chosen for our gathering is linked below, and as a special treat, it comes with a **[product credit value]** product credit that you can apply to your next Boisset purchase:
[link to the flight product page]

If you have any questions about the wines, how to participate or about shipping or product credits, feel free to reach out directly to our Ambassador [Ambassador's name] who can be reached at [Ambassador's contact info].

Please RSVP so we can get you your wines ASAP!

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SAMPLE INVITATION *Templates*

SAMPLE EMAIL INVITATION - CUSTOMER-HOSTED TASTING (More formal event where the host is purchasing all of the flights)

Please join us for a guided “virtual” wine tasting experience, featuring a flight of exceptional wines from the award-winning wineries of the Boisset Collection on **[Date]** from **[Start Time to End Time]**! The wines will be shipped directly to each confirmed guest, compliments of **[name of host or organization]**.

We will be coming together online to **[celebrate X occasion / support Y cause / fulfill Z business purpose]** as we connect over glasses of the same wines, and to enjoy a fully guided wine tasting experience. Our Boisset Ambassador **[Ambassador’s name]** will lead the tasting, giving us a taste of the wine country tasting room experience from the comfort of home!

The flight we’ve chosen for our gathering features exclusive wines, that are normally only available for sampling at the wineries:
[link to your flight product page]

If you have any questions about the wines, shipping or other aspects of participating, feel free to reach out directly to our Ambassador **[Ambassador’s name]** who can be reached at **[Ambassador’s contact info]**.

Please RSVP so we can get you your wines in plenty of time for the event.

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SAMPLE CONFIRMATION EMAIL *Template*

Once people have purchased their flight for a virtual tasting experience, you will need to provide a confirmation email that:

- Provides the link/password for them to participate in the videoconference
- Provides instructions for preparing for their tasting and sets expectations for the event flow and timeline

SAMPLE CONFIRMATION EMAIL TO PARTICIPANTS

Thank you for placing your order. We're so excited that you will be joining us online for our **[name of the flight]** on **[Date]** from **[Start Time to End Time]**!

See below for the link to connect to our videoconference: **[Paste in invitation details / links provided by your videoconference service.]**

On the day of the event, you'll want to be sure that the wines all taste their best, so keep the reds at room temperature and refrigerate everything else for at least a few hours beforehand. Go ahead and open each bottle in advance so they're ready to pour, and have at least one wine glass on hand for each person tasting! It's also a great idea to have something to snack on as we taste. Cheeses are always the most flattering pairing, ideally aged cheddar or a creamy cheese like Brie.

If you'd like more info about the wines in advance, you can find all the details linked at **[link to your flight's product page]**. That's also where you will find our "Tasting Mat" document, which has your menu and order form on the back. It's helpful to print that 2-page document out ahead of time so you can easily follow along.

Don't forget that your product credit is available and ready to use on your next purchase, and valid for 60 days. Feel free to contact me if you have any questions or concerns regarding your wine order, the product credit or about this upcoming event!

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SAMPLE REMINDER EMAIL *Template*

The day before your tasting, you'll want to reach out and remind participants how to connect to the virtual tasting and what they'll need to do in terms of set up and preparation.

SAMPLE REMINDER EMAIL TO PARTICIPANTS

I hope you're as excited as I am for tomorrow's virtual tasting, which will begin promptly at **[Start Time]** and end at **[End Time]**!

First, here is the link to connect to our videoconference: **[Paste in invitation details / links provided by your videoconference service.]**

Also, just a reminder that you'll want to be sure that the wines all taste their best, so keep the red wines at room temperature and refrigerate the other bottles for at least a few hours beforehand. It's a good idea to open each bottle in advance so they're ready to pour.

In terms of stemware, you'll want to have at least one wine glass on hand for each person tasting. It's also a great idea to have something to snack on as we taste, since the wine will make you hungry. Cheeses are always the most flattering pairing, and pretty much any cheese will do nicely. Aged cheddars are ideal, but most firm or creamy cheeses are great too.

If you'd like to review the wines in advance, you can find all the details linked at **[link to your flight's product page]**. That's also where you will find our "Tasting Mat" document, which has your menu and order form on the back. It's very helpful to print that 2-page document out ahead of time so you can easily follow along.

Don't hesitate to contact me if you have any questions or concerns, whether that's about your wine order, about how to connect the videoconference platform, how to redeem your product credit (**only if they purchased their flight**) or anything else at all. I can't wait to see you there!

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