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Case Study

Company: California Winery

Industry: Winemaking

Solution: Payment processing and shipping automation solutions

Results:

- The winery is able to process multiple orders at once, cutting processing time by 98 percent.

- Shipments are prepared in two days rather than two weeks.

- Savings in both costs and fees were seen in the first two weeks.

The Perfect Blend: Payment and Shipping Software Expedites Wine Orders for Temecula Winery

"We have saved both time and money by implementing XYZ Solutions," Thor said. "The software paid for itself within the first two weeks."

Bob and Sue Thor opened their winery in 1988 looking for a new way to enjoy their passion for great wines. Thor Winery, located in Temecula Valley's wine country creates award winning wines based on there passion for old world style and new world taste. They chose Temecula Valley because they recognized early on the great potential of the region's value for winemaking.

Today, Thor Winery is a family business that now includes Bob and Sue's three sons and their families. Over the years, Thor Winery has seen steady growth, starting out they produced just 5,000 cases of wine per year but now, with the increased popularity of wine lovers and their wine club membership, they are producing more than 20,000 cases of wine per year and they are still growing. With sales through their membership, phone orders, and website, they needed to find a more effective way to organize their customer's requests and find an efficient way to send wine and bill for monthly orders.

Shipping Is Out of Control

As membership has increased, so has the volume of orders that are shipped each month, and that increase has made it difficult for the winemakers to fulfill orders. They were taking up to two weeks each quarter to prepare and ship orders to wine club members, and the amount of time it took to prepare each order was about ten to fifteen minutes of staff time to process them.

"It was becoming more and more difficult to keep orders organized and as membership grew, we felt as if it was getting out of control. Our old way wasn't working," said Sue Thor, owner. "We have a lot of visitors and we need to give them personal attention and they expect to receive their orders on time."

One Click Away From Processing Orders and Payments

When Thor Winery chose its CRM solution, they decided to include integrated payment and shipping software from XYZ Solutions to expedite order fulfillment. Now, with a few clicks of the mouse, they are able to share information throughout their whole system.

"Although there are many choices in software for wineries, we wanted a solution that could integrate our whole system, from accounting to website ordering to CRM to shipping. We went with XYZ Solutions because they could integrate very well with our CRM software, and would make it easier to fulfill orders and complete payment processing," said, Sue Thor.

The staff can simply log in to the customers account in the CRM software and process the order from start to finish. The system automatically calculates the order total, charges the customer's card and sends the shipping information to print the label. The system also sends an email to the customer with the shipping information and the tracking number and then stores it all in the wineries system. It's all done automatically so nothing can go wrong. You don't have to worry about additional screens popping up or a lot of buttons to push.

Because of the right CRM integration, the staff can process orders whether they are at the tasting bar or off site in the office.

What has been most impressive is how stable the system has been. It has taken the worry out of having the ability to process orders as needed. "Processing orders is so simple. There is nothing to worry about now. It's like a well oiled machine."

Saving on Costs and Fees

Having the automation, the system is able to process multiple orders at once, has cut processing time and order fulfillment by 98 percent, and has saved the winery thousands of dollars each year in merchant fees.

Membership continues to grow and with more than 1200 members, the wine club has become much easier to manage. "What used to take us two weeks now takes two days," said, Thor. "Now we are able to have our staff focus on the customer, the wine, and the growing wine club."

Saving on credit card processing fees and labor costs has given a quick return on investment. "We have saved both time and money by implementing XYZ Solutions," Thor said. "The software paid for itself within the first two weeks."