

# Wine Club Sales Training Case Study

## Project Overview

As part of a self-directed instructional design project, I created a soft-skills training for a fictional winery's tasting room staff. The goal was to help new associates sell wine club memberships with greater confidence-supporting revenue growth while ensuring a relaxed, hospitality-focused guest experience.

This mobile-friendly Rise course uses real-world scenarios, a mentor-style narrator, and approachable design to make learning feel easy and immediately applicable.

## The Challenge

Many tasting room associates are passionate about wine and enjoy talking with guests-but hesitate when it's time to promote wine club memberships. Some feel awkward "selling," while others are unsure how to introduce the club without sounding pushy.

Wineries often miss out on valuable recurring revenue when staff aren't equipped with the right words, timing, or confidence. This training needed to be warm, supportive, and practical-mirroring the kind of conversation a guest might enjoy during a tasting.

## My Process

### Analyze:

- Identified common soft-skill challenges in wine club sales through industry research and hospitality role experience
- Defined learning goals focused on confident language, guest-centered timing, and building trust
- Outlined key friction points for new staff, such as introducing the club naturally and handling objections

### Design:

- Wrote a full storyboard with realistic tasting room scenarios
- Introduced Zoe, a relatable mentor character who models soft skill strategies and encourages learner engagement
- Designed interactions that reinforce tone, timing, and guest-focused phrasing

#### Develop:

- Built the course in Articulate Rise using the Mighty plug-in for enhanced design flexibility
- Created Zoe and the tasting room setting using a layered visual design process: beginning with photographs, evolving through photo-realistic AI imagery, then moving to flat vector graphics with textured color inspired by a design style found online
- Used Canva and AI tools to generate supporting graphics
- Voiceover narration was generated with AI tools to create a warm, consistent tone
- Course is mobile-friendly and chunked into short, digestible sections for just-in-time learning

#### Implement & Evaluate:

This project is featured in my portfolio as a sample of scenario-based sales training in a hospitality context. Peer and mentor feedback affirmed that the tone felt approachable, the pacing was well-balanced, and the course would resonate with new associates or seasonal staff.

#### Key Deliverables

- \* Full written & visual storyboard
- \* Final Rise course with scenario-based walkthroughs and AI narration
- \* Custom-designed mentor character (Zoe) and tasting room setting created using a layered AI and design process
- \* Visual style inspired by modern design aesthetics, including vector-style illustrations and textured color palettes
- \* Mobile-friendly layout with interactions that support sales soft skills in a hospitality context

## Style Guide

### Color Palette:

- Merlot - #6A2C3A
- Golden Cream - #F8E3B8
- Slate Gray - #5A5A5A
- Blush - #E8C2CA

### Fonts:

- Playfair Display (headings)
- Lato (body text and UI elements)

The tone was warm, supportive, and confidence-boosting-ideal for onboarding new staff in guest-facing winery roles.

## Why It Matters

This project let me blend instructional design strategy with a real-world hospitality lens. I drew on my communication and training experience-plus my interest in wine culture-to create a course that builds both confidence and connection.

It also demonstrates my ability to design soft-skills content for sales-focused roles using modern tools like Articulate Rise, Canva, and AI assets. It complements my compliance- and nonprofit-focused projects by showcasing a fresh, brand-aligned approach to sales training.

## Let's Make Learning Bloom

Looking for a designer who can craft soft-skills training that's warm, actionable, and aligned with your brand? Let's connect.