

Business and Marketing Plan Template

The information in this template acts as a starting point for the development of a business and marketing plan for your cellar door and winery tourism operations.

It is not exhaustive by any measure, but provides a framework and reference point for your own business planning purposes. You will also need to take into account things like Human Resource planning, Product Development and Risk Management.

Examples are provided throughout the document in *italics* to guide you in forming your own responses. Before completing your final document, remove all “explanatory” text and replace with a succinct overview for the section.

This information was prepared by Dig + Fish Marketing Group. www.digandfish.com

Business Name			
Address:			
Contact Details:			
Document Date:		Next Review Date:	
Document Author:			

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1 Business Details

Registered Business Name & Trading Name:			
ACN:		Date of Issue:	
ABN:		Date of Issue:	
Proprietors Name & Contact Details:			
Managers Name & Contact Details:			
Document Date:		Next Review:	
Document Author:			

1.1 Business Outline

What is the business? *The business is a direct-to-customer sales facility through which we offer visitor services, provide an opportunity to taste wines, sell wine by the glass, bottle and case and develop a face-to-face relationship with our customers. It also provides a method of attracting customers to become direct mail clients who buy wine regularly throughout the year.*

Why does the business succeed? *Personal attention to our customers through the cellar door builds loyalty. The operation of the cellar door is conducted primarily by members of our family, close friends and others who are passionate about our wine. The overheads are relatively low and each sale returns our highest possible margin on our product.*

What is the image we portray at our cellar door? *Our cellar door is the opportunity to put a face and personality to our wine. This personality must be one of warmth and friendliness underpinned by a professional approach to our business operation. We wish to convey a fun and welcoming environment which is supported by happy staff with a 'nothing is a problem' attitude.*

What is the experience we offer? *We offer a complete wine tourism experience where guests can follow our wine from the vineyard to the glass via our estate tours. We also provide a food and wine experience with our regional tasting plates, local roasted coffee and regional preserves.*

Who are our customers? *Our primary audience is regional travellers seeking a high-end wine experience. They are knowledgeable about wine, know what they like and appreciate a direct relationship with the cellar door and are seeking exclusivity. The second is a tourism audience seeking an entertainment experience. They will go on our tour, have a regional tasting plate and take a little something home, spending more on the day but less likely to be case buyers or join wine club.*

[NB: a word on target marketing – Traditional demographics and psychographics don't really hold because a high-income professional living in the inner city is no more likely to be an interested wine consumer than a lower-income person from the outer suburbs. How people behave and what interests them is what we want to know about, not just what they do or how much they earn!

2 Vision & Objectives

What is your **vision** for Cellar Door?

Is it to be the best, biggest, most respected, most visited? You need to articulate the vision for your site so your team know what they are helping to bring to life – it's why they come to work every day.

What **objectives** do you have for your cellar door? Remember: all objectives need to be measurable and actionable. If you can't see a pathway to deliver on the objective then re-write it! Generally, you cannot have more than 5-6 high level business objectives. If you do they are not strategic enough, so consider whether they are actually a subset of another objective.

Vision
<ul style="list-style-type: none">• <i>Be recognised nationally as the pre-eminent cellar door destination in our region</i>
Objectives
<ul style="list-style-type: none">• <i>Build a strong brand that delivers a real consumer experience and makes a genuine, authentic connection with its consumers. A brand that is seen as a regional leader.</i>• <i>Develop a diverse, interesting product offer that encourages repeat visitation and differentiates us from our neighbours.</i>• <i>Build cellar door and direct sales to a level equal to or better than 60% of total sales.</i>• <i>Attract and retain a high performance team with a strong business culture and defined way of doing business.</i>• <i>Lead the way with environmental initiatives and minimise our carbon footprint.</i>

3 Situation Analysis

Total Current Plantings in Acres/Hectares	Total volume of wine produced to bottle	Total volume of wine sold via direct channels
<i>Varieties:</i>	<i>Varieties:</i> <u>9L cases</u>	<i>Varieties:</i> <u>9L cases</u>
Chardonnay – ha	Chardonnay – 0000	Chardonnay – 0000
Pinot Noir – ha	Pinot Noir – 0000	Pinot Noir – 0000
Shiraz – ha	Shiraz – 0000	Shiraz – 0000
Riesling – ha	Riesling – 0000	Riesling – 0000
		% of total sales:
Total volume sold at Cellar Door	Total volume sold via Direct Mail	Total volume sold via online channels
<i>Varieties:</i> <u>9L cases</u>	<i>Varieties:</i> <u>9L cases</u>	<i>Varieties:</i> <u>9L cases</u>
Chardonnay – 0000	Chardonnay – 0000	Chardonnay – 0000
Pinot Noir – 0000	Pinot Noir – 0000	Pinot Noir – 0000
Shiraz – 0000	Shiraz – 0000	Shiraz – 0000
Riesling – 0000	Riesling – 0000	Riesling – 0000
% of total direct sales:	% of total direct sales:	% of total direct sales:
NB: You may wish to also split out your wine club or standing order sales. You can replace this whole table with your own sales reports.		
Cellar Door Performance:		
Opening Hours		
Number of Staff	fulltime	casual
Number of Visitors to Cellar Door	-	0000 p/a (approximately)
Visitor Distribution	Weekends	Weekdays
Total Revenue from Cellar Door Sales	-	\$ p/a
Services, facilities and attractions at cellar door	Memberships	
Wine Tasting	Regional Tourism Association	
Light Lunches	Regional Vignerons Association	
Winery Tours	Tourism Industry Organisations	
Regional Visitation	Current Industry Trends	
Number of Visitors to Region		
Origin of Visitors		
Purpose of Visit		
Length of Stay		

Regional Attractions

Significant Restaurant

Golf Courses

Accommodation

Cellar Doors

Galleries

Festivals and Events

Etc.

3.1 SWOT Analysis

STRENGTHS - Internal	WEAKNESSES - Internal
<ul style="list-style-type: none"> • <i>Brand Profile</i> • <i>Appealing ambience</i> • <i>Longest established winery in region</i> • <i>Well trained and friendly staff</i> • <i>Proximity to main traffic flow</i> • <i>Reputation of Restaurant</i> • <i>Seen as a desirable employer</i> • <i>Hands on winemaker who participates in marketing initiatives</i> • <i>Owners on site full time and available at cellar door</i> • <i>Etc.</i> 	<ul style="list-style-type: none"> • <i>Reliance on casual staff</i> • <i>Seasonality (variable visitor numbers)</i> • <i>Low production in previous two seasons</i> • <i>Distance from capital city</i> • <i>Limited space to cope with growth</i> • <i>Lack of group management facility</i> • <i>No private tasting room</i> • <i>Etc.</i>
OPPORTUNITIES - External	THREATS - External
<ul style="list-style-type: none"> • <i>Gourmet Food Trail under development</i> • <i>New Council CEO</i> • <i>State Government funding scheme</i> • <i>Co-operative regional wine and food marketing group</i> • <i>Co-op marketing opportunities with other tourism product</i> • <i>Quality of regional accommodation and produce</i> • <i>National Wine Tourism Strategy development</i> • <i>Etc.</i> 	<ul style="list-style-type: none"> • <i>Vignerons Association lacks a tourism focus</i> • <i>Increasing profile of other regions</i> • <i>Lack of other tourism attractions in region</i> • <i>Poor regional winery signage</i> • <i>Road maintenance required</i> • <i>Limited pool of skilled staff</i> • <i>Changes to planning / licensing</i> • <i>Etc.</i>
<p>Implications</p> <p>The most important aspect of any SWOT analysis is thinking through and clearly articulating the implications of the SWOT. What does all this mean for your business? How do you play to your strengths and/or work to convert your weaknesses to strengths? How do you maximise the external opportunities and mitigate the threats? Based on the SWOT above, these are some of the implications you could draw out:</p> <ul style="list-style-type: none"> • <i>How do we maintain our brand profile and continue to be seen as a leader in the region?</i> • <i>There is a need to rethink our product offer to ensure we can cope with demand in our limited facilities.</i> • <i>We may need to look at grower contracts or a broader regional wine offer at CD to help manage low yielding vintages</i> • <i>How do we ensure we have a compelling offer so we are a “must stop” venue in the gourmet food trail?</i> • <i>There is a need to influence the strategic direction of the vigneron association and increase its tourism focus</i> • <i>Etc.</i> 	

3.2 Competitor Analysis

Individuals will have differing views about who their competitors are. Local tourism attractions and cellar doors are competing for your visitors but regional co-operation can also result in more customers. Other wine regions and other major tourism attractions are also competing for business – but equally, they can be business allies.

Lifestyle activities such as health and beauty pursuits may take potential customers away or can be viewed as complementary. Retail wine stores may challenge you on price, but alternatively may introduce new customers to your wines. Think about who your real competitors are, and after careful analysis, consider whether they are also potential partners to attract more visitors and “grow the pie”.

Benchmarking is a term used to ascertain how you’re faring against your competitors. By analysing what your competitors do, you can make decisions about how to improve your product or service by adapting what you have, creating a new offering or discontinuing something altogether. This relates to advertising, marketing, experiences and customer service as well as your core product offerings. Learning from your competition makes good business sense and is also known as “investing in your threats”. Also consider using external “mystery shopper” programs for an objective analysis.

Choose your top 2-4 competitors and plan to conduct the analysis over time. In particular, look at areas that differentiate you from your competitors – especially the weaknesses. View each aspect from the perspective of what is important to your customers and visitors and collate as much information as possible.

Details	You	Competitor 1	Competitor 2
Location and proximity			
Key products and services			
Key features and benefits			
Pricing policy			
Product / service quality			
Target market/s			
Customer service quality			
Marketing initiatives			
Website effectiveness			
Strengths			
Weaknesses			
Key point of difference			

4 Key Challenges and Objectives

Once you have completed the situation analysis, you can then define the key challenges for your business. These should draw a line between the implications from your SWOT, the starting point of where you are today, and the objectives – where you want to be.

Then each key challenge has a series of strategic responses and actions that relate to them which form the action section of your marketing plan.

KEY CHALLENGE	BUSINESS OBJECTIVE

5 The Action Plan

This is where the rubber starts to hit the road and you are working on the actions that address each objective.

Objective 1: <i>Build a strong brand that delivers a real consumer experience and makes a genuine, authentic connection with its consumers. A brand that is seen as a regional leader.</i>	
Strategic Responses	Recommended Actions
<i>Complete a brand definition exercise to ensure we thoroughly understand our brand</i>	<ul style="list-style-type: none"> • <i>Brand definition</i> • <i>Brand audit</i> • <i>Gap analysis</i> • <i>Action plan</i>
<i>Benchmark our consumer experience and understand where we are at.</i>	<ul style="list-style-type: none"> • <i>Conduct a mystery shopper exercise</i> • <i>Review all CD procedures and training standards</i>

Objective 2: <i>Develop a diverse, interesting product offer that encourages repeat visitation and differentiates us from our neighbours</i>	
Strategic Responses	Recommended Actions
<i>Define the current product offer</i>	<i>Articulate the current customer experience</i> <i>Seek external feedback on that experience</i>
<i>Conduct a competitor product review</i>	
<i>Clearly articulate the desired product offer</i>	

Objective 3:	
Strategic Responses	Recommended Actions

5.1 Timeline

Once you've documented your strategic responses and actions, you can apply them to a table like the one below or an Excel spreadsheet set out as a 12-month calendar. The important thing is that the activities have ownership, deadlines and budgets to make sure action really happens!

The following activities are just examples to illustrate the point – you need to ensure yours reflect the content of your strategy and deliver on your objectives.

Activity	Purpose	By when	Who	Budget / Cost
<i>Review product sales to consider performance</i>	<i>Fine tune product mix</i>			
<i>Review packaging and measure against selected benchmarks</i>	<i>Maintain market acceptance and incorporate new concepts</i>			
<i>Identify a hero product and hero personality for the cellar door</i>	<i>Link other opportunities, use as a press hook, have focused promotional material produced</i>			
<i>Establish data base collection process and data management system</i>	<i>Build mail order sales</i>			
<i>Develop website and establish system to maintain currency</i>	<i>Refer queries to / act as an electronic brochure (might be e-commerce linked)</i>			
<i>Create new contemporary brochure</i>	<i>To represent our image in a consistent and modern way</i>			
<i>Commission photographer for seasonal file photos</i>	<i>To use on website and in brochure</i>			
<i>Send three great photos to State Tourism Office</i>	<i>For photo file usage in publications and media</i>			
<i>Create a monthly networking event</i>	<i>Familiarise other regional wineries and attractions with our product</i>			
<i>Visit Visitor Information Centre every six weeks</i>	<i>Retain front-of-mind positioning, build relationship</i>			
<i>Events/activities Participate in regional food and wine festival</i>	<i>Support local association, reinforce presence within region, attract people out to cellar door</i>			

	<p><i>Increase exposure of our brand and get people to taste wines</i></p> <p><i>Demonstrate regional commitment</i></p> <p><i>Positioning opportunity, chance to increase profile with staff and provide an event for our mail list</i></p>			
<p><i>Create a signature food and wine event at the winery</i></p>	<p><i>Create profile as a leading destination on the gourmet food trail.</i></p> <p><i>Establish a 'fun in wine' attitude</i></p> <p><i>Generate media attention</i></p>			
<p><i>Media/Public Relations</i></p> <p><i>Develop four key themes to build media release around</i></p>	<p><i>Bring attention to our wineries through story in XYZ magazine</i></p>			
<p><i>Join with ABC & XYZ to bring Joe Bloggs (journos) to the region</i></p>	<p><i>Have presence and build profile through participating in events and activities</i></p>			
<p><i>Write editorial for local publications / including photo</i></p>	<p><i>Build a sense of being the region's most prominent cellar door</i></p>			
<p><i>Send Media releases to State Tourism Organisation</i></p>	<p><i>Remain front of mind</i></p>			

6 Financial considerations

Your business and marketing plan should include an overview of your cellar door's financial position, its projected performance and your allocation of funds to cellar door activities and marketing.

A profit and loss schedule could be attached, along with a cash flow spreadsheet and operations statement (just a few words about how you intend to operate, i.e. overdraft, trade from earnings etc. If you do not have financial statements, complete the simple table below, using your actual figures at cellar door.

You should also note if you intend to make a capital investment back into the cellar door and how that will be funded and evaluate what your anticipated return on investment will be.

	<i>FY 1</i>	<i>FY2</i>	<i>FY3</i>	<i>FY4</i>
<i>Income</i>				
<i>Income from wine sales</i> <i>Income from other</i>				
<i>Total Income</i>				
<i>Less Expenses</i>				
<i>Wine @ cost</i> <i>Marketing</i> <i>Wages</i> <i>Utilities (power/phone etc.)</i> <i>Training</i> <i>IT / Web / CRM</i> <i>Freight</i> <i>Promotions</i> <i>Credit card charges</i> <i>License fees</i> <i>Staff amenities</i> <i>WET tax liability</i> <i>GST liability</i> <i>Etc.</i>				
<i>Total Expenses</i>				
<i>Net Profit/Loss</i>				