

Wine Marketing and Sales - Workbook Tutorial

The purpose of the **Wine Marketing and Sales Portfolio Workbook** is to give a comprehensive view of, and help manage, your entire portfolio of wines, along with their contribution to your total revenue and margin by corresponding sales channels. For example, if you offer multiple vintages and varieties, at various production quantities and prices, and sell through separate sales channels, you are able to view potential outcomes for your entire range of wines you sell.

Marketing Sales & Portfolio Management Workbook ✎

Full Instructions, Industry Resources and FAQs

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Marketing/Sales Budget: \$ 0.00

Total Gross Margin: \$ 0.00

Net Profit (Loss): \$ 0.00

Project Info

Portfolio Pricing

Sales Channel Allocations

Sales Channel Report

Payroll

Sales & Mktg Expense Budgets

Income Statement

Your name Value below will update as you complete each worksheet

Winery name

Date

Total revenue : \$ 0.00

Gross margin : \$ 0.00

Marketing Budget : \$ 0.00

Sales Budget : \$ 0.00

Sales & Marketing Payroll : \$ 0.00

NET PROFIT (LOSS) : \$ 0.00

Tasting room volume : 0.00 Cases

Wine Club volume : 0.00 Cases

Account direct volume : 0.00 Cases

Wholesale distribution volume : 0.00 Cases

Export volume : 0.00 Cases

TOTAL CASE VOLUME : 0.00 Cases

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Project Info Tab

1. Workbook Title: Click on Pencil Icon next to Edit Workbook Name – (top left of page).
2. Full instructions, Industry Resources and FAQs – live link to support page.
3. Click on TABS to preview content and navigate through the workbook.
4. Enter Your Name, Winery Name, Date
5. Click Save or Next to continue to Portfolio Pricing worksheet

At any time in any workbook, you may use **Download as PDF, Clone, Print All, Reset, or Need Help** functions.

For use with Wine Business Education financial calculators and online learning resources.



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Full Instructions, Industry Resources and FAQs

Marketing/Sales Budget: \$ 0.00 **Total Gross Margin: \$ 0.00** **Net Profit (Loss): \$ 0.00**

Project Info **Portfolio Pricing** Sales Channel Allocations Sales Channel Report Payroll Sales & Mktg Expense Budgets Income Statement

Product name (wine name/variety/vintage & any designations)	COG	FOB	Preliminary retail price estimation*	#Cases	Gross Revenue	Gross Margin %	Gross margin per Case \$	Gross margin Total \$
<input type="text" value="Product Name"/>	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="text" value="\$1.33"/>	<input type="text" value="#"/>	<input type="text" value="\$0.00"/>	<input type="text" value="0.00%"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
<input type="text" value="Product Name"/>	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="text" value="0"/>	<input type="text" value="#"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
+ ADD MORE								
TOTALS				0	\$ 0.00		\$0.00	\$ 0.00

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Portfolio Pricing

1. Enter the Product Name for a wine: variety, wine name, vintage.
2. Enter the Cost of Goods for the wine (internal cost of finished product, usually set by production).
3. Enter the FOB (or ex-cellar) price for this wine – price that distributors, account direct, importers pay, or internal transfer price.
4. Enter the number of total cases of this wine you intend to sell.

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Marketing/Sales Budget: \$ 0.00
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Project Info | Portfolio Pricing | Sales Channel Allocations | Sales Channel Report | Payroll | Sales & Mktg Expense Budgets | Income Statement

Enter the % of wine sold via each of the following sales Channels. DtC 'best practice' is to use FOB/Ex-cellers pricing for transfer of goods to tasting room or wine club shipments to maintain a separation of profitability for the winery versus tasting room and wine club profit and loss statements. See Tasting Room and Wine Club Calculator to run these separate plans. Make sure that the last column equals 100%.




Wine Name <small>Note Enter or change wine name on Portfolio Pricing tab</small>	Cases Produced	Margin per case	DtC: Tasting Room Transfers	Cases	DtC: Wine Club Transfers	Cases	Account Direct (in-state)	Cases
None	0	\$0.00	%	0.0	%	0	%	0
None	0	\$0.00	%	0.0	%	0	%	0
TOTAL CASES	0			0		0		0

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Sales Channel Allocations

1. On this page your will allocate the percentage of total production will be sold through the individual sales Channels.
2. Each row should equal 100% at far right of row.
3. Changes to the Wine Name and Cases Produced can be changed on the Portfolio Pricing tab.
4. Margin Per Case is auto-populated from Portfolio Pricing tab.

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Marketing/Sales Budget: \$ 0.00 **Total Gross Margin: \$ 0.00** **Net Profit (Loss): \$ 0.00**

Project Info Portfolio Pricing Sales Channel Allocations **Sales Channel Report** Payroll Sales & Mktg Expense Budgets Income Statement

Enter the % of wine sold via each of the following sales Channels. DTC best practice is to use FOB/Ex-cellars pricing for transfer of goods to tasting room or wine club shipments to maintain a separation of profitability for the winery, tasting room and wine club profit and loss statements. See Tasting Room and Wine Club Calculator to run these separate plans.

Wine Name <small>Note Enter or change wine name on Portfolio Pricing tab</small>	Cases	Transfer or selling price	Margin per case	Tasting room			Wine club		
				Cases	Transfer Revenue	Margin	Cases	Transfer Revenue	Mar
None	0	\$	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$
None	0	\$	\$0.00	0	\$0.00	\$0.00	0	\$0.00	\$
TOTAL CASES	0			0	\$0.00	\$0.00	0	\$0.00	\$

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Sales Channel Report

This report is automatically populated from inputs on the previous pages. To adjust, change or make additions to this report go to the appropriate tab and change the inputs in the source cells.

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Marketing/Sales Budget: \$ 0.00 Total Gross Margin: \$ 0.00 Net Profit (Loss): \$ 0.00

Project Info Portfolio Pricing Sales Channel Allocations Sales Channel Report **Payroll** Sales & Mktg Expense Budgets Income Statement

For Direct to Consumer, tasting room, hospitality and/or wine club sales refer to the Tasting Room and Wine Club Workbook.

MARKETING

Position	Base Salary	Benefits level %	Benefits amount	Bonus %	Bonus amount
<input type="text" value="Job Title"/>	<input type="text" value="Base Salary"/>	<input type="text" value="%"/>	<input type="text" value="\$0.00"/>	<input type="text" value="%"/>	<input type="text" value="\$0.00"/>
+ ADD MORE					
MARKETING PAYROLL		0.00%	\$0.00	0.00%	\$0.00

SALES

Position	Base Salary	Benefits level %	Benefits amount	Bonus %	Bonus amount
<input type="text" value="Job Title"/>	<input type="text" value="Base Salary"/>	<input type="text" value="%"/>	<input type="text" value="\$0.00"/>	<input type="text" value="%"/>	<input type="text" value="\$0.00"/>
+ ADD MORE					
SALES PAYROLL		0.00%	\$0.00	0.00%	\$0.00

TOTAL PAYROLL **\$0.00**

PAYROLL ALLOCATED TO COST OF GOODS PER CASE **\$0.00**

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Payroll

1. Enter position Job Title, Base Salary, Benefits (ie, 10-25%, as percentage of salary) and Bonus (%age).
2. ADD MORE positions as needed

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Marketing/Sales Budget: \$ 0.00 Total Gross Margin: \$ 0.00 Net Profit (Loss): \$ 0.00

Project Info Portfolio Pricing Sales Channel Allocations Sales Channel Report Payroll **Sales & Mktg Expense Budgets** Income Statement

Direct to Consumer, tasting room, hospitality and/or wine club sales see Tasting Room and Wine Club Workbook for details

TOTAL REVENUE \$0

	% of Total Revenue	Marketing Budget
1 General Promotional Budget	<input type="text"/> %	\$0.00
2 Discounts, distributor billbacks and samples	<input type="text"/> %	\$0.00
3 Printing and collateral materials	<input type="text"/> %	\$0.00
4 Advertising and social media	<input type="text"/> %	\$0.00
5 Event participation	<input type="text"/> %	\$0.00
6 Travel and Entertainment	<input type="text"/> %	\$0.00
7 Market reports and data purchases (Nielsen, etc.)	<input type="text"/> %	\$0.00
8 Donations	<input type="text"/> %	\$0.00
9 Sampling allowances	<input type="text"/> %	\$0.00
10 Breakage and returns	<input type="text"/> %	\$0.00
11 Other	<input type="text"/> %	\$0.00
12 Additional fixed budget items		\$ <input type="text"/>
MARKETING BUDGET TOTAL		0.00

TOTAL MARKETING BUDGET INCLUDING PAYROLL FROM PREVIOUS PAGE \$0.00

	% of Total Revenue	Marketing Budget
13 Incentives, distributor billbacks and samples	<input type="text"/> %	\$0.00
14 Event participation	<input type="text"/> %	\$0.00
15 Travel and Entertainment	<input type="text"/> %	\$0.00
16 Donations	<input type="text"/> %	\$0.00
17 Breakage and returns	<input type="text"/> %	\$0.00
18 Sampling allowances	<input type="text"/> %	\$0.00
19 Other	<input type="text"/> %	\$0.00
20 Additional fixed budget items		\$ <input type="text"/>
SALES BUDGET TOTAL		\$0.00

SALES BUDGET TOTAL INCLUDING PAYROLL FROM PREVIOUS PAGE \$0.00

TOTAL SALES AND MARKETING BUDGETS WITH PAYROLL \$0.00




PER CASE ALLOCATION \$0.00

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Expense Budgets Worksheet

Enter budget % for each line. If you are working from a fixed \$ amount toggle the % of Total Revenue among up or down until the proper \$ amount is reflected in the Marketing Budget column.

Repeat process for creating sales budget.

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Marketing/Sales Budget: \$ 0.00 Total Gross Margin: \$ 0.00 Net Profit (Loss): \$ 0.00

Project Info Portfolio Pricing Sales Channel Allocations Sales Channel Report Payroll Sales & Mktg Expense Budgets **Income Statement**

Direct to Consumer, tasting room, hospitality and/or wine club sales see Tasting Room and Wine Club Workbook for details

TOTAL REVENUE \$0.00

	Revenue by channel	\$ Margin by channel	% Margin by channel	Cases allocated by channel	% case sales by channel
1 TOTAL REVENUE	\$0.00				
2 Tasting Room Transfers	\$0.00	\$0.00	0.00%	0	0.00%
3 Wine Club Transfers	\$0.00	\$0.00	0.00%	0	0.00%
4 Account direct (in-state)	\$0.00	\$0.00	0.00%	0	0.00%
5 Wholesale domestic (3-tier)	\$0.00	\$0.00	0.00%	0	0.00%
6 Export sales	\$0.00	\$0.00	0.00%	0	0.00%
7 TOTAL	\$0.00	\$0.00	0.00%	0	0.00%
8 Marketing payroll		\$0.00			
9 Sales payroll		\$0.00			
10 Marketing payroll and expenses		\$0.00			
11 Sales payroll and expenses		\$0.00			
12 TOTAL Marketing and Sales payroll and expenses		\$0.00			
13 NET PROFIT (LOSS)		\$0.00			

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Income Statement

This page displays the breakdown of revenue, margins case volume and percentage of sales via each sales channel. Rows 8-15 will reflect the payroll and budgets from the Sales & Marketing Expense Budgets tab.

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