

Title	Document #	Location	Rev #	Effective Date
Greenhouse Wholesale Process	WHO-001	Main Winery	0	02/05/2026

Greenhouse Winery Wholesale Process

Complete Lead-to-Sale System

Version 1.0 | Created: January 2026

Table of Contents

1. [Process Overview](#process-overview)
2. [Lead Generation & Qualification](#lead-generation--qualification)
3. [Outreach Scripts & Templates](#outreach-scripts--templates)
4. [Sales Meeting Framework](#sales-meeting-framework)
5. [Pricing & Terms](#pricing--terms)
6. [Order Management with Square](#order-management-with-square)
7. [Ongoing Account Management](#ongoing-account-management)
8. [Metrics & Success Tracking](#metrics--success-tracking)

Process Overview

The 7-Stage Wholesale Journey

LEAD → QUALIFY → REACH OUT → PRESENT → NEGOTIATE → CLOSE → MANAGE

Timeline: 2-8 weeks from first contact to first order

Key Principle: We're not just selling wine---we're offering

Pennsylvania-crafted stories and experiences that help restaurants and retailers differentiate their offerings.

Lead Generation & Qualification

Lead Sources

1. **Direct Outreach** (Primary focus)
 - Local restaurants (10-mile radius)
 - Wine shops and specialty retailers
 - Hotels and event venues
 - Corporate clients and country clubs
2. **Referrals** (Highest conversion)
 - Current customers at tasting room
 - Existing wholesale accounts
 - Industry connections
3. **Inbound** (Track separately)
 - Website inquiries

- Event attendees
- Social media DMs

Qualification Criteria (BANT Framework)

Budget: Can they afford \$200+ minimum orders? - Yes = Continue -

Unknown = Ask during initial call - No = Defer, keep in nurture list

Authority: Are you speaking with the decision-maker? - Owner, Beverage Director, Purchasing Manager = Green light - Server, General Manager (report to owner) = Get introduction

Need: Do they have a wine program? - Active wine list = Priority - Building wine program = Educate - No wine program = Long-term nurture

Timeline: When are they looking to bring on new wines? - Next 30 days = Hot lead - 1-3 months = Warm lead

- 3+ months = Nurture list

Lead Scoring System

Score each lead 1-10 based on: - Location proximity (closer = higher) - Current wine program quality - Customer base alignment (do their customers match our profile?) - Decision-maker accessibility - Expressed interest level

Action by Score: - 8-10: Contact within 24 hours - 6-7: Contact within 1 week - 4-5: Add to monthly nurture campaign - 1-3: Keep on file, revisit quarterly

Outreach Scripts & Templates

Initial Contact: Cold Email Template

Subject Line Options: - "Pennsylvania wines for [Restaurant Name]'s wine list" - "Local partnership opportunity - Greenhouse Winery" - "Award-winning wines from your backyard"

Email Body:

Hi [First Name],

I'm Steb from Greenhouse Winery in North Irwin—just [X miles] from [Restaurant Name]. I noticed your focus on [local ingredients/craft beverages/seasonal menus] and wanted to reach out.

We're producing award-winning wines right here in Pennsylvania, and several restaurants in the area have found our wines resonate with customers looking for local, quality options.

Our wholesale program offers:

- ✓ Pennsylvania-crafted wines with compelling stories

- ✓ Competitive pricing with flexible minimums
- ✓ Direct delivery from the winery
- ✓ Marketing support and staff training

Would you be open to a 15-minute call this week to discuss whether Greenhouse wines might be a fit for your program? I can also drop off samples if that's easier.

Looking forward to connecting,

Steb

Greenhouse Winery

[Phone] | [Email]

www.greenhousewinery.com

Initial Contact: Cold Call Script

Opening (First 15 seconds - CRITICAL):

"Hi [Name], this is Steb from Greenhouse Winery in North Irwin.

I know you're busy, so I'll be quick—do you have 30 seconds?"

[Wait for response]

"Great! We're a Pennsylvania winery producing wines that several local restaurants have added to their lists. I wanted to see if you'd be open to learning more about our wholesale program. Do you handle wine purchasing, or should I speak with someone else?"

If they're interested:

"Excellent. Rather than take your time now, could we schedule 15 minutes this week? I can bring samples and show you how other restaurants are featuring our wines. What day works better—Tuesday or Thursday?"

If they're busy/not interested:

"I completely understand. Can I send you some information by email and follow up in a few weeks? What's the best email?"

[Get email]

"Perfect. I'll send that over today, and I'll check back in [timeframe]. Thanks for your time!"

Objection Handling:

Objection Response

"We're all set" "That's great you have relationships you're happy with our current with. Most of our restaurant partners kept their

suppliers" existing suppliers and just added 2-3 of our wines for customers looking for local options. Would it make sense to explore that?"

"We don't have "I hear you---wine lists are precious real estate. room on our wine What if I showed you how restaurants with similar list" space constraints are doing a 'local spotlight' rotation? You could swap 1-2 bottles seasonally."

"We don't buy "I appreciate the honesty. Can I ask---is that local wines" because of past quality concerns, or just not your focus?" \[Then address accordingly\]

"What are your "Great question. Our wholesale pricing ranges from prices?" \\$X to \\$Y per bottle depending on variety and volume. But pricing only matters if the wine fits your program. Could we schedule 15 minutes so I can understand your needs first?"

"Send me "Happy to! I've found a quick conversation helps me information" send exactly what's relevant to you. Do you have 5 minutes now, or should I call back at a better time?"

Follow-Up Sequence (if no response)

Day 0: Initial email sent

Day 3: Follow-up email

Subject: Following up - Greenhouse Winery

Hi [Name],

Just wanted to make sure my email didn't get buried. I'd love to explore whether our Pennsylvania wines could complement [Restaurant Name]'s beverage program.

I'll give you a call this week, but if you'd like to connect sooner, just reply with a good time.

Best,

Steb

Day 7: Phone call (use script above)\

Day 14: Final email + call

Subject: Last note - Greenhouse Winery partnership

Hi [Name],

I don't want to be a pest, so this will be my last reach-out for now. If you're interested in exploring local wines for your program down

the road, I'm here. If not, no worries at all—I appreciate you taking the time to read this.

Either way, wishing you continued success with [Restaurant Name].

Cheers,

Steb

P.S. If timing just isn't right now, when should I check back in?

(Many restaurants refresh their lists seasonally)

Day 30: Move to quarterly nurture list

Sales Meeting Framework

Pre-Meeting Preparation

Research Checklist: - [] Review their current wine list (website, social media) - [] Understand their cuisine style and price points - [] Note any local/regional focus in their marketing - [] Check recent reviews for wine program mentions - [] Identify 3-4 Greenhouse wines that fit their profile

Materials to Bring: - [] Sample bottles (3-4 max, pre-selected) -

[] Tasting notes/spec sheets - [] Pricing sheet (wholesale + suggested retail) - [] Current restaurant partner list - [] Order form (blank) - [] Business cards

Meeting Structure (30-45 minutes)

Phase 1: Discovery (10 minutes)

Ask open-ended questions: 1. "Tell me about your wine program---what's working well?" 2. "Who's your typical customer? What are they ordering?" 3. "How do you currently source wines? Any pain points?" 4. "Do you feature any local products? How do customers respond?" 5. "What would make a new wine supplier valuable to you?"

Listen for: - Price sensitivity - Customer preferences -

Decision-making process - Current supplier relationships - Timeline for changes

Phase 2: Present Solution (15 minutes)

Positioning Statement:

"Based on what you've shared, I think Greenhouse could be a great fit for [specific reason from their answers]. Let me show you why."

Key Value Props (choose 2-3 most relevant):

1. **Local Story Sells

- "We're 15 minutes from here. Your servers can say 'this wine is

made in North Irwin' and customers light up."

- Share example: "[Restaurant X] saw their local wine sales increase 40% by featuring our wines."

2. **Quality at Competitive Prices

- "We're priced competitively with commercial wines, but you're getting Pennsylvania craft quality."
- Show price comparison chart

3. **Marketing Partnership

- "We provide table tents, social media shout-outs, and staff training."
- Show examples of co-marketing

4. **Flexible Ordering

- "Start with a case or two. No massive minimums, no long-term contracts."
- Emphasize risk-free trial

Product Presentation: - Limit to 3-4 wines maximum - Match each wine to their menu/customer base - Tell the story behind each wine - Provide suggested food pairings specific to their menu - Give them samples to taste (if appropriate setting)

Phase 3: Address Concerns (10 minutes)

Common Concerns & Responses:

Concern	Response Strategy
"I'm worried customers won't buy Pennsylvania wines"	Share success stories with specific data. Offer a trial period with guaranteed buyback if wines don't move.
"We have limited storage"	"I understand. We can deliver smaller quantities more frequently if that helps."
"What if we don't sell it?"	"Fair concern. Let's start with 1-2 bottles by the glass and track sales for 30 days. If they don't move, we'll adjust."
"Our wine list is set for the season"	"I respect that. When do you typically refresh? Let's plan for [season]---I'll check in a month before."

Phase 4: Close (5-10 minutes)

Trial Close:

"Based on our conversation, does it make sense to move forward with a trial order?"

If YES: - Complete order form together - Confirm delivery details - Schedule staff training (if applicable) - Set follow-up date to check inventory

If NOT READY:

"What would need to happen for this to make sense for you?"

Then address specific barriers, or if timing is the issue:

"No problem at all. When should I follow up? And would you like me to leave a bottle for you to try in the meantime?"

Always Get Next Step: - Schedule specific follow-up date - Get permission to send samples - Agree on trial period parameters

Pricing & Terms

Wholesale Pricing Structure

Tier 1: Case Orders (12 bottles) - Base wholesale price - Example:

\\$12/bottle retail → \\$7.20 wholesale (40% margin)

Tier 2: Multi-Case Orders (3+ cases) - 5% additional discount -

Example: \\$12/bottle retail → \\$6.84 wholesale

Tier 3: Volume Accounts (10+ cases/month) - 10% additional discount - Example: \\$12/bottle retail → \\$6.48 wholesale

Pricing Formula:

Retail Price × 0.60 = Wholesale Price (40% margin)

Retail Price × 0.57 = Multi-case (43% margin)

Retail Price × 0.54 = Volume (46% margin)

Standard Terms

Payment Terms: - **New accounts:** Payment due upon delivery (first

3 orders) - **Established accounts:** Net 15 or Net 30 (after 3+ successful orders) - **Payment methods:** Square invoice, check, credit card

Minimum Orders: - **Initial order:** 1 case (12 bottles) - can be mixed - **Reorders:** 6 bottles minimum

Delivery: - **Free delivery:** Orders over \\$200 within 20 miles -

Delivery fee: \\$25 for orders under \\$200 or 20+ miles - **Pickup option**: Available at winery (no fee)

Returns & Exchanges: - Defective bottles: 100% replacement within 30 days - Non-defective returns: Not accepted after delivery - Damaged in

transit: Must report within 24 hours

Account Setup: - PA Liquor License verification required - Federal Resale Certificate (if applicable) - Complete W-9 for tax purposes
Suggested Retail Pricing Guidance

Recommended Markup for Restaurants:

Wholesale Price \times 2.5 to 3.0 = By-the-glass price

Wholesale Price \times 2.0 to 2.5 = By-the-bottle price

Example: - Wholesale: \\$8/bottle - Suggested retail bottle:
\\$16-20 - Suggested by-the-glass (5 glasses/bottle): \\$5-6/glass -
Restaurant makes: \\$25-30/bottle gross profit
Order Management with Square
Taking the Order

Step 1: Create Customer in Square 1. Open Square POS or dashboard 2.

Go to Customers → Add Customer 3. Enter: - Business name - Contact name - Phone number - Email address - Delivery address - **Add custom note**: "Wholesale - Net [15/30]"

Step 2: Build the Order 1. Create new sale 2. Add each wine SKU and quantity 3. Apply wholesale discount: - Option A: Apply custom discount percentage - Option B: Use custom pricing (if products have wholesale price tier) 4. **Add delivery fee if applicable**

Step 3: Generate Invoice 1. Instead of charging immediately, select "Send Invoice" 2. Choose invoice due date: - New account: "Due upon receipt" - Established: "Net 15" or "Net 30" 3. Add delivery date in notes section 4. Include payment instructions

Invoice Template Notes Section:

Order Date: [Date]

Delivery Date: [Date]

Payment Terms: [Due upon receipt / Net 15 / Net 30]

Payment Methods: Square invoice (card), check, cash

Delivery Notes: [Any special instructions]

Questions? Contact Steb at [phone/email]

5. Send invoice via email through Square

Order Tracking Spreadsheet

Create Google Sheet: "**Wholesale Orders - 2026**"

Columns: - Account Name - Contact Name - Order Date - Invoice Number (from Square) - Items Ordered (SKUs & quantities) - Order Total -

Delivery Date - Delivery Status (Pending/Delivered/Picked Up) - Payment Status (Pending/Paid) - Payment Date - Payment Method - Next Follow-up Date - Notes

Update process: 1. After creating Square invoice → Add row to spreadsheet 2. After delivery → Update delivery status 3. After payment received → Update payment status 4. Set calendar reminder for follow-up date

Payment Collection

Payment Tracking: - Square automatically tracks invoice status (Sent/Viewed/Paid) - Set up automatic payment reminders in Square (Day 7, Day 14) - Check Square dashboard daily for payments

Past Due Process:

Day 1 Past Due: Friendly email

Subject: Friendly reminder - Invoice #[Number]

Hi [Name],

Just wanted to check in on invoice #[Number] for \$[Amount]. It was due on [Date]. I know things get busy!

You can pay directly through the Square invoice link, or let me know if you need me to resend it.

Thanks,

Steb

Day 7 Past Due: Phone call - Keep it friendly and assume positive intent - "Hi \[Name\], just checking on invoice \[number\]. Did you receive it?" - Offer to help solve any issues

Day 14 Past Due: Formal email + call

Subject: Important - Outstanding invoice #[Number]

Hi [Name],

Invoice #[Number] for \$[Amount] is now 14 days past due. I want to work with you to get this resolved.

Please let me know if there's an issue with the invoice or if we need to discuss payment arrangements.

I'll give you a call later today.

Best,

Steb

Day 30 Past Due: Hold future orders - Email: "Until invoice #\[X\] is paid, we're unable to process new orders." - Consider whether to

continue relationship

Ongoing Account Management

First 90 Days (Critical Period)

Week 1-2: Post-Delivery - Day 3: Text or call to confirm wines arrived safely - **Week 2:** "How's it going?" check-in - Ask about customer response - Offer to provide additional marketing materials - Address any concerns immediately

Week 4: First Reorder Window - Check Square inventory (if they're tracking) - Proactive outreach: "Checking in---need a reorder?" - If slow movement, offer solutions: - Staff training session - By-the-glass promotion - Social media collaboration

Week 8: Relationship Building - Invite to winery event - Share any press/awards - Ask for feedback and improvement suggestions

Week 12: Quarterly Business Review - Review sales data - Discuss what's working/not working - Plan for next season - Introduce new releases

Ongoing Touchpoints

Monthly: - Sales check-in (email or text) - "Need anything?" message - Share 1 piece of valuable content (recipe pairing, wine education, etc.)

Quarterly: - In-person visit or video call - Bring new samples - Discuss performance and opportunities - Strengthen relationship

Seasonally (4x/year): - Introduce seasonal releases - Update wine list recommendations - Invite to seasonal events at winery

Annually: - Formal business review - Negotiate pricing/terms for next year - Plan marketing collaborations - Thank you gift during holidays

Staff Training Offerings

Option 1: Quick Training (30 minutes) - Visit restaurant before shift - Taste through wines with staff - Provide tasting notes and selling points - Answer questions

Option 2: Formal Training (1 hour) - Winery story and philosophy - Deep dive on each wine - Food pairing recommendations for their menu - Practice selling scenarios - Q&A

Provide Staff Tools: - Laminated tasting notes for each wine - Quick-reference selling points - Pronunciation guide - Sample dialogue:

"This Cabernet Franc is from Greenhouse Winery, just 15 minutes from here..."

Retention Strategies

Recognition: - Feature them on social media - "Partner Spotlight" on website - Thank you notes from ownership

Exclusive Perks: - First access to limited releases - Invitation to private winery events - Complimentary bottles for special occasions

Make Their Life Easier: - Consistent delivery times - Quick response to requests - Flexible with emergency orders

Surprise & Delight: - Unexpected free bottle with delivery - Birthday/anniversary recognition - Holiday gift basket

Metrics & Success Tracking

Key Performance Indicators (KPIs)

Activity Metrics: - Leads generated per week: Target 10 - Outreach attempts per week: Target 25 - Meetings scheduled per week: Target 3 - Meetings held per week: Target 2

Conversion Metrics: - Lead → Meeting rate: Target 20% - Meeting → Trial order rate: Target 50% - Trial → Repeat customer rate: Target 60%

Revenue Metrics: - New accounts per month: Target 2-4 - Average order value: Target \\$250 - Repeat order frequency: Target every 30-45 days - Customer lifetime value: Target \\$3,000/year

Health Metrics: - Customer retention rate: Target 80% - Average payment time: Target <20 days - Customer satisfaction (informal survey): Target 8+/10

Monthly Reporting Dashboard

Track in spreadsheet: "Wholesale Dashboard - 2026"

MONTH: [January 2026]

LEAD ACTIVITY:

- New leads added: [X]
- Outreach attempts: [X]
- Meetings scheduled: [X]
- Meetings held: [X]

SALES ACTIVITY:

- New accounts opened: [X]
- Total orders: [X]
- Total revenue: \$[X]

- Average order value: \$[X]

ACCOUNT HEALTH:

- Active accounts: [X]
- Accounts ordering this month: [X]
- Accounts past due: [X]
- Average days to payment: [X]

PIPELINE:

- Hot leads (likely to close in 30 days): [X]
- Warm leads (30-90 days): [X]
- Nurture leads (90+ days): [X]

Weekly Planning Template

Monday Morning Planning (30 minutes):

1. Review last week's numbers

- What worked?
- What didn't?
- Lessons learned?

2. Set this week's priorities

- [] How many new leads to generate?
- [] How many outreach attempts?
- [] How many meetings to schedule?
- [] Which accounts need check-ins?

3. **Block time on calendar

- Prospecting time: \[X hours\]
- Meetings: \[X scheduled\]
- Follow-ups: \[X hours\]
- Admin/invoicing: \[X hours\]

4. **Prepare materials

- [] Sample bottles ready?
- [] Marketing materials printed?
- [] CRM/spreadsheet updated?

Appendix: Quick Reference

Email Templates Summary

1. Initial cold outreach

2. Follow-up #1 (Day 3)
3. Follow-up #2 (Day 14)

4. Post-meeting thank you

5. Order confirmation

6. Payment reminder (friendly)

7. Payment reminder (formal)

Call Scripts Summary

1. Cold call opening

2. Objection handling

3. Appointment setting

4. Check-in call

5. Reorder prompt

One-Page Sales Process

1. IDENTIFY leads (restaurants, retailers, venues)

2. QUALIFY leads (BANT: Budget, Authority, Need, Timeline)

3. REACH OUT (email + call combo)

4. MEET (Discovery → Present → Close)

5. DELIVER (Create Square invoice, schedule delivery)

6. FOLLOW UP (Week 2, Week 4, Week 8, Weekly 12)

7. GROW (Reorders, upsells, referrals)

Document Control: - **Created by:** Steb\

- **Date:** January 2026\

- **Version:** 1.0\

- **Next Review:** March 2026\

- **Location:** Greenhouse Winery Operations Manual

This wholesale process is designed to be implemented immediately while remaining flexible enough to evolve as you learn what works best for Greenhouse Winery's unique market position.