

**Company:**

Ponzi Vineyards

Industry:

Winemaking

CRM solution:

GoldMine®

Z-Firm solution:

ShipRush® Server, CashRush

Results:

- The vineyard runs multiple orders at once – cutting processing time from about 10 minutes down to less than 30 seconds per order.
- The ability to run multiple charges at once in CashRush allowed the winery to negotiate lower transaction fees with its merchant services provider, which saves Ponzi thousands annually.
- Ponzi prepares wine club shipments in two days instead of two weeks, and avoided having to add two full-time staff to handle the club orders.
- Savings on labor costs and credit card fees paid for CashRush and ShipRush the first week.

“The time and money we save with CashRush and ShipRush probably add up to two full-time people. The software paid for itself in the first week.”

— Michael Ponzi, Operations Manager, Ponzi Vineyards

For more information, visit us at www.zfirm.com or call (206) 812-RUSH

Success Story: Ponzi Vineyards

Ponzi Vineyards Blends ShipRush & CashRush to Expedite Wine Orders

With a spirit of adventure and a passion for making world-class wine, Dick and Nancy Ponzi launched Ponzi Vineyards in Oregon’s Willamette Valley in 1970. One of the first to recognize the region’s value for winemaking, the family was instrumental in shaping the Oregon wine industry. Since its first barrels of Pinot Noir, the winemaker has become internationally acclaimed for its limited production Pinot Noir, Chardonnay, Pinot Gris, Pinot Blanc, Arneis, Dolcetto and White Riesling.

Today, under the second generation of Ponzi Vineyards, the winery produces about 17,000 cases per year and is growing quickly. With direct sales – via phone, the Web site or at retail locations – expanding by 25-30 percent per year for the past few years, the company needed a more effective way to keep up with customers’ specific requests and preferences, as well as help in expediting orders. Ponzi might send 10 shipments a day during low season, and up to 40 during high season.

But shipping volume reaches its highest during quarterly distribution to members of Ponzi’s wine club, Amici di Ponzi. In just a couple of years, the club has grown from 70 to 700. Previously, the winemaker struggled through a manual order fulfillment process, spending about two weeks every quarter preparing and shipping orders to club members. Each order could take more than 10 minutes of staff time to process.

“It was getting unmanageable to have just a list of customers and manual processing,” said Michel Ponzi, Operations Manager. “We deal with a lot of customers daily and we need to make sure we treat them more on a personal basis, remembering details like what kinds of wines they like, and ensuring that they receive their shipments on time.”

Managing Customers & Orders with One Integrated System

Ponzi turned to Gateway Solutions, a Premier level reseller partner in Portland, Oregon. After considering the company’s needs, Gateway brought in GoldMine customer relationship management software and ShipRush Server and CashRush from Z-Firm to expedite order fulfillment. Gateway then tied the GoldMine CRM software to the existing ACCPAC accounting system. Now it is a matter of a couple of clicks to share information across the whole system.

“There are lots of products out there that are custom-made for wine clubs or POS centers,” Ponzi explained. “But we wanted a solution that would integrate with everything else we were doing,

all our accounting systems, web orders, CRM and shipping. We liked ShipRush and CashRush because they integrate really well with GoldMine, and make it quicker to get orders out and cards charged.”

Gateway Solutions trained nine Ponzi employees at the vineyard, retail locations and event center on how to use the integrated system for order processing and customer management. Users simply go to the customer’s account record in GoldMine, and with the click of a button the order is processed end to end: the system automatically calculates the total, charges the credit card using CashRush, and triggers ShipRush Server to print the FedEx shipping label. ShipRush Server also emails the tracking number to the customer and stores the tracking number into GoldMine history.

All this processing is automatic once the user triggers the order processing track in GoldMine. There are no screens to click through and no cut-and-paste.

Thanks to the tight CRM integration, even off-site staff are productive. Employees who work off site, at Ponzi’s wine bar or at home, can process orders remotely through CashRush and ShipRush Server. Regular synchronization of GoldMine keeps the information current in the integrated system.

Reliable Stability and Support

Michel Ponzi has been particularly impressed with the system’s stability, finding he doesn’t have to worry that it won’t be available when it’s needed most. “ShipRush and CashRush work every time and are reliable, stable, easy to use and transparent. We just make sure it’s on, and that’s about it.”

He credits Gateway Solutions with matching Ponzi with valuable third-party solutions and ensuring they all integrate seamlessly. “Gateway has the knowledge and expertise to say, ‘Here’s what works. We know these products work together.’ They basically put the whole package together and made it work for us. They’re professional, quick to respond, and have the knowledge and expertise.”

Results: Reduced Fees & Labor Costs Drive Immediate ROI

With an automated process handling credit card charges and shipping preparation, the vineyard runs multiple orders at once – cutting processing time from about 10 minutes down to less than 30 seconds per order.

The merchant services supported by CashRush helped the vineyard save thousands of dollars a year on merchant fees. Ponzi soon plans to move all their credit card charges to CashRush to further reduce its fees.

Now at 700 members, and growing every day, the wine club has become much more manageable. ShipRush and CashRush tap into customers’ shipping preferences and financial information in GoldMine to process orders. Michel Ponzi estimates that the winery would have had to bring on extra staff to handle the growing wine club.

“We’re able to get a handle on our wine club now,” Ponzi said. “Every time we do it, the list is larger. What used to take maybe two weeks now, we can do in two days.”

Savings on labor costs and credit card fees drove an almost-immediate return on investment in ShipRush and CashRush. “The time and money we save with CashRush and ShipRush probably add up to two full-time people,” Ponzi said. “The software paid for itself in the first week.”

About Ponzi Vineyards

Founded more than 35 years ago in Oregon’s lush Willamette Valley, Ponzi Vineyards is internationally acclaimed for producing some of the world’s finest Pinot Noir, Chardonnay, Pinot Gris, Pinot Blanc and White Riesling. Wine pioneers Dick and Nancy Ponzi have set the standard for

Oregon's viticultural innovation while maintaining an unwavering commitment to a tradition of winemaking excellence. Today, this philosophy is carried on by the Ponzi family's second generation.

About Gateway Solutions, Inc.

Gateway Solutions combines 11 years of experience in implementing technology for sales force automation to help your CRM system work for you, not the other way around! The company designs a system that stays focused on growing your business, not just providing your clients' phone numbers in Goldmine. Gateway Solutions' primary goal is to develop and implement simple solutions people can use to improve efficiency and effectiveness. The company creates face-to-face selling tools that reduce the sales cycle and improve your close rate. For Information, Call 503-345-9176

About Z-Firm

Z-Firm automates and streamlines small businesses with easy, integrated software. Z-Firm has developed award-winning CRM and accounting add-ons for nearly a decade. Used by tens of thousands of users, Z-Firm's software reduces complex processes to a smooth, integrated button. The OmniRush[®] Family includes CashRush[®], EmailRush[™], FaxRush[®], PrintRush[™], and ShipRush Server. The OmniRush Family of products is a suite of utilities every business can use. OmniRush Family members provide true CRM integration for shipping, email, fax, and print. The OmniRush Family can also be integrated into nearly any SQL based application using the database platforms already used by most companies, including Oracle, SQL Server, MySQL and others.

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