



New York Wine & Grape Foundation

1 Keuka Business Park,  
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Penn Yan, NY 14527

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www.newyorkwines.org

## Global Messaging RFP Q&A

### REVISED TIMELINE

Proposals Due	November 29 <sup>th</sup> , 2021
Notification of Interview (if selected as finalist)	December 9 <sup>th</sup> , 2021
Interview Date(s)	December 14 <sup>th</sup> and/or 15 <sup>th</sup> , 2021
Project Award	January 7 <sup>th</sup> , 2022
Project Completion	June 30 <sup>th</sup> , 2022

### BUDGET

**Is the total available budget \$75K? I am a bit confused by the Year-1 plan reference. The RFP indicates completion by July 1, 2022, so that would seem to be within Year 1. I am guessing the total budget is \$75K.**

Correct. "Year 1" is from project award date through June 30th, 2022. The total budget for that time period is \$75,000.

**The RFP states a budget of \$75,000 for year 1 plan, with the potential of additional in subsequent years. The proposed scope appears to be initial in nature, but can you please elaborate on what you might anticipate in subsequent years?**

The goal of this particular project is to design assets that will be deployed throughout NYWGF domestic and international marketing activities. Those activity budgets are developed annually in partnership with various funders (i.e., New York State, USDA, regional funders, etc.) and they vary each year. NYWGF domestic and international marketing budgets were approximately \$675,000 each (for both strategy *and* activities) in FY 21-22.

### GOALS

**What type of state and regional graphics do you need and how many? In general, more clarity on number of assets required would be helpful.**

A suite of regional graphics (or assets) should be suggested by the consultant based on their research, and messaging for each AVA as noted in the deliverables. Please refer to similar to Oregon regional toolkits. There is no specific number in mind. NYWGF views this as a starter kit of regional tools and will review and/or add to them on a regular basis. Again, we see it as the role of the consulting partner to understand the importance of telling each region's story and crafting that story so that there is an organic 'fit' with the Boldly, NY. brand and messaging pillars.

**When you say "State and regional graphics" do you mean create imagery around the NY AVA's? Or do you mean create an ad campaign for each of the 4 audiences?**



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Imagery related to statewide and AVA messaging pillars, based on the deliverables laid out in this project and not a specific ad campaign. These should be tools that can be used in domestic and international marketing activities as outlined in the RFP. In the future they may also be incorporated into the toolkits for each of the target audiences or developed into a campaign.

### **Looking into the State and Regional graphic development, can you please expand on desired content (i.e., AVA maps, digital brand communications pieces, social media assets, etc.)?**

All of these may be options. NYWGF would depend upon the consulting partner to provide a logic model/rationale as to their proposed set of core assets based on their knowledge of our goals, resources, and brand identity.

### **Confirming all of the design deliverables are trade-facing, no consumer-facing materials?**

Per our personas and messaging map linked in the RFP, consumers are a target audience and materials should consider them. Most especially in the development of the Tasting Room Toolkit, Retail Toolkit, Restaurant Toolkit, and New York Wine Month Campaign Toolkit.

### **When looking at the Oregon toolkit references while valuable, they did not seem super engaging nor a leap from where you are. Is the goal of this to draw excitement and participation from stakeholders around the NY Wines story?**

The Oregon reference was to illustrate a desirable, logical method for addressing important and impactful regional nuances in wine marketing within one state. The goal for Boldly, NY. is to always be innovative and engaging for our stakeholders AND entice target audiences to learn more about NY wines, participate in marketing activities, visit NY wine country, and buy NY wines.

### **How important is it that the assets and ideas we create are exciting and breakthrough? As a bold brand we feel you have an opportunity to carve up a competitive space with strong creative. We are asking because again, the references don't jump out as particularly creative or bold in tone.**

To clarify, the references were to illustrate how an evolved wine region marketing association employs a logical method for addressing regional differences in wine marketing within one state or country, not because NYWGF wanted to emulate the specific design approach. The goal for Boldly, NY. is to always be innovative and engaging for our stakeholders AND entice target audiences to learn more about NY wines, participate in marketing activities, visit NY wine country, and buy NY wines.

### **How will we know we succeeded at this project? What result are you hoping to accomplish with stakeholders and/or otherwise?**

All deliverables in the RFP will be complete by June 30th, 2021. The assets, build out of content, messaging pillars, audit of website, PLUS training of key partners are the critical pieces to this project. NYWGF does not expect measurable impact on brand awareness, wine tourism & visitation, and/or wine sales until well into 2022. Further, those results will come from NYWGF integration of new assets into existing domestic and international marketing activities. KPIs are developed with reps in each market and reported to funders and stakeholders annually.



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### **What are your business goals for 2022? How do you see global messaging and marketing assets contributing towards your goals?**

Continue to establish the Boldly, NY. brand in the global marketplace for being the world's premier region for cool and cold climate viticulture. Consistent messaging, quality graphics, and user-friendly toolkits for our partners will make it easier and tell the story and elevate New York wines in the minds of buyers (trade and consumers).

### **Is the primary focus of your marketing efforts focused on awareness building? Do you support tactics or marketing that also drive direct conversions such as tasting room visitors, wholesale distribution, or online sales?**

The goal of this particular project is to design assets that will be deployed throughout NYWGF domestic and international marketing activities. Those efforts are designed to primarily raise awareness and build a brand for New York wines among buyers (importers, retailers, restaurants.) In mid-2022 NYWGF anticipates incorporating more activations focused on consumers with specific CTAs (i.e., NY wine month, visit NY Wine Country, Buy NY Wines Online, etc.)

### **How is the current messaging content used? How do you see the expanded New York State Wine Messaging Content being used?**

Messaging is current used by international marketing representatives in China, Hong Kong, Japan, Western Europe, and Canada to promote NY Wine classes, virtual tasting events, and other activations such as Buyer Roundtables. Please see our Export Program updates here. <https://newyorkwines.org/industry/new-york-wines-export-program/> Domestic programs feature Tier 3 Members primarily, however not exclusively. Please click the link for a list of recent activities in which messaging content was used recently. [https://mailchi.mp/nywgf/member-update-5356398?e=\[UNIQID\]](https://mailchi.mp/nywgf/member-update-5356398?e=[UNIQID]). Messaging, graphics, and other assets will continue to support all domestic and international trade and consumer facing marketing activities.

### **Accountability is key for any partner of yours. As you go through the journey of evaluating your new potential partners, do you have clear goals of what you are hoping to achieve with this new relationship? Are there metrics, performance goals or acquisition benchmarks the NYWGF will hold the partner to?**

A successful partnership would mean that all deliverables listed in the RFP would be complete by June 30th, 2021. The assets, build out of content + messaging pillars PLUS training of key partners are the critical pieces to this project. NYWGF does not expect significant impact on brand awareness, visitation, and/or wine sales until well into 2022. Further, those results will come from NYWGF global strategy and integration of new assets into existing marketing activities.

### **For future recommendations, specifically to the "Restructure & Deployment of Assets," are there channels on which you would like to rely and/or favor? That is, Google Advertising? Trade publications? Trade influencers? etc.**

That reference in the RFP was in regard to the website and its structure. NYWGF is prioritizing our [www.newyorkwines.org](http://www.newyorkwines.org) as the hub for all NY wine information and would like to ensure that the information is easily



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accessible to our target audiences (ala Oregon making its resources available by audience and then by type of file, etc.) Future strategic planning on deployment of assets through the international or domestic marketing programs will be done by those teams annually.

**Are there any specific KPIs you are looking to achieve? Number of downloads of assets? Website visitors? Growing the Instagram audience? etc.**

Important KPIs would include all deliverables completed by June 30th, 2022. Number of key constituents trained on Boldly, NY. brand, messaging pillars, assets, and toolkit use. Number of asset download requests, restructured website or rationale as to placement of new assets on site. NYWGF does not expect significant impact on brand awareness, visitation, and/or wine sales until well into 2022. Further, those results will come from NYWGF global strategy and integration of new assets into existing marketing activities.

**Marketing Partner Assets – there are numerous channels and segments for consideration. Is there a prioritization and utilization plan for the desired deliverables?**

International and domestic trade and consumers are priority audiences. Assets should be flexible enough to be used across channels or consulting partner should provide guidance on adaptations for social media (for example). Please refer to list of Marketing Partner Assets as that provides a good framework as to what NYWGF has planned.

**The RFP notes Global Messaging & Marketing – does the anticipated scope addressed in the proposal have to address both domestic communications and international/export market communications and, if the latter, are there key markets for NY wines as desired of markets of focus/priority? If so, what are they and what are targeted markets for further development?**

Yes, the scope must address both international and domestic markets as a requirement of the funding source(s). Target international markets for 2022-2024 are China, Hong Kong, South Korea, Vietnam, Japan, Western Europe, Canada. For domestic marketing, our top (4) target markets are New York State (focus on New York City), Pennsylvania, District of Columbia, Florida.

**One of the best ways to know how to move forward is how NYWGF got to where it currently is. What marketing strategies have you incorporated that have done well, that have come up short or that just did not work well at all?**

The assets will be employed in strategies and tactics defined by international marketing representatives and our domestic marketing rep in the future. Please see the newsletter links referenced above of examples of the types of activities they employ.

### **INTERNATIONAL**

**Unlike America, international data rules and regulations for websites are much more challenging to navigate than in the United States. Understanding which countries will help in both strategic development but also auditing the website, as requested.**



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Target international markets for 2022-2024 are China, Hong Kong, South Korea, Vietnam, Japan, Western Europe, Canada. Please note that NYWGF has one (1) micro-site currently for WEU trade and media. That can be located here: <https://www.newyorkwines.co.uk/>

### **How important is the global piece on this assignment?**

Equally as important as the domestic piece.

### **Is there a particular country this campaign is to focus on?**

Target international markets for 2022-2024 are China, Hong Kong, South Korea, Vietnam, Japan, Western Europe, Canada.

### **MESSAGING**

#### **You say you want to expand on the work you have done on messaging however you have already done extensive work in this area. What do you hope to accomplish with this new work that the work thus far has not accomplished?**

The research and resulting messaging done was statewide and high level, which was a great start. We do, however, need to go broader (regional / AVA messaging) and deeper (development of specific stories to support each pillar). The goal for the next phase is a more comprehensive portfolio of assets that will be used in domestic and international marketing strategies as outlined in the RFP and above.

#### **Expanded New York State Wine Messaging Content/AVA Specific Messaging Pillars and Content - wouldn't these want to be consistent with the revisions of the *Wine Course & Reference*? Just thinking that it might make sense to complete the update and then work on the above so that the information included is all consistent.**

Good question! The *New York Wine Course & Reference Guide* will be informed by the current statewide messaging pillars already in existence. Also, there are regional updates to the NYWCR already done to which the successful consultant can have access during their creative process. We would also be happy to connect the successful consultant with Dan Belmont, who will be drafting the guide update. We know it is a 'work in progress,' as the NYWCR will be revised regularly and incorporate regional messaging and updates to the regional stories.

#### **On AVA specific messaging, how different do you expect this to be? Shouldn't we be building a New York Wines brand first?**

New York messaging pillars have been established and will be used as appropriate where that brand is the lead. NYWGF anticipates that regional partners, wine trails, and certain activations will require a deeper dive into more refined AVA messaging.

#### **The RFP asks for expanded New York State Wine Messaging Content and AVA specific content – is there existing media kits or content that requires updating or is this new content development? Namely, if this a refresh and expansion or new completely new content projects?**



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Links to existing media kits and current messaging were included in the RFP. There will also be access to AVA specific information through the *New York Wine Course & Reference Guide*. Please see above.

**When you say build out the existing messaging content for domestic and international target audiences, can you put any more specificity around that? What is the vision for expanding the content? Why do you feel the need to expand it?**

Please see above.

### **NYWGF CAPABILITIES**

**What internal solutions do NYWGF team members have to work with the marketing toolkits, content, and creative assets? (IE: Photoshop, video production, social media solutions/management like Spout, email service platforms, etc.)**

Adobe Creative Suite (primary experience with Photoshop, Illustrator, InDesign), Canva Pro, MailChimp, no social media management software/services at this time.

**Do you have any in house video production capabilities or have a collection of assets, both video and photography, that would be available for use?**

We have a collection of recent photos of wineries/winemakers in FLX, HV, & LI regions. Little to no video footage. (Do we know what usage rights we have with the old videos we have?)

**Do you have a database of New York wine photography we can have access to?**

Yes, we have recent photos of winemakers and wineries/vineyards. Though this may not cover 100% of the needs of this project.

**Do you have marketing analysis of target demographics so we can help judge the past success of reaching said audience(s)?**

NYWGF has data from 2018 that informed our *Wine Tourism Marketing Toolkit*. That information will be shared with the successful consulting partner if needed. One note here is that buying trends have changed so much due to the pandemic we gather that data may not be especially relevant at this point.

**For project deployment, is there a requested plan for implementation into the given markets or is there NYWGF staff or other consultants tasked with implementation, or should the project include subsequent planning for implementation downline to do so?**



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Outside of the plan and implementation of key constituent training, no plan for implementation is requested included in this request. NYWGF has prioritized the deliverables (assets, training, website audit) listed in the RFP. Those deliverables will then be deployed by our strategic partners in each target market.

### **OPERATIONS**

#### **Why not keep working with the marketing partner who created the NYWGF audience personas/messaging pillars**

NYWGF is seeking a pro-active partner with specific wine region knowledge, preferably of New York or other cool climate regions. NYWGF also seeks a partner with deep and sophisticated design skills, on-staff educators, and thought leaders.

#### **How is the team at NYWGF setup? Who are the point people your new partner will be communicating with at NYWGF?**

NYWGF operates as a small team of seven (7). The Executive Director operates with a management team, the Director of Programs & Marketing and Director of Operations. The Director of Programs & Marketing will be the main contact person for this project; however, the working group will include NYWGF's Communications Manager and representatives from Bryant Christie, International (NYWGF's International Program Managers).

#### **How does NYWGF prefer to share information (IE: Dropbox, Google, etc.) and to conduct meetings? (IE: Zoom, Microsoft Teams, etc.)**

NYWGF provides access to a Teams channel for our consulting partners.

#### **Any chance of breaking up this RFP into two?**

NYWGF is willing to review a proposal for a single component within the RFP (i.e., website audit). Obviously, other proposals may come in from companies with website expertise, along with the marketing, design, and training capabilities we are seeking. Comprehensive proposals would be given a higher ranking by our committee if quality of work is perceived to be similar.

### **TOOLKITS**

#### **For the toolkits we imagine a page on goals and then a rich collection of activation ideas and creative assets that people can immediately deploy - for e.g., offer examples of a possible Father's Day promo and social posts for retailers. Are we right about that or are we getting too executional?**

The general approach seems correct. It is most important that NYWGF has a core toolkit for each partner establishing the Boldly, NY. brand first. If time and room in the budget, regional or holiday campaigns can be included.

#### **You are asking for media and trade toolkits, but you have a press kit? Again, where do you think the current materials are lacking?**



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Correct. NYWGF views a press kit as different than a marketing activation toolkit (which is what we are asking for in this RFP). NYWGF currently has no tools for key partners (wine trails, regional promo assns., retailers, restaurants, media) to easily implement a campaign, feature a story on NY wines, incorporate NY wines into a menu, or even on a retail shelf. The successful partner will provide a toolkit that would make those activations easy and desirable in supporting their business.

### **How long and detailed do you expect these toolkits to be?**

NYWGF sees this as the role of the consulting partner to determine.

**In terms of creating assets like the toolkits, do you have a preliminary sense of what you would like to see in each toolkit? Can you give a sense of how much new or unique content will need to be developed for each toolkit; that is, is it simply a matter of developing a custom intro and using messages for that audience to introduce material that essentially will be the same across all marketing partner toolkits or is each toolkit a really bespoke piece?**

We have provided links to several wine region toolkit and marketing asset examples. We would like to see what your company suggests for NYWGF based on your assessment of our goals, capacity, and budget.

**For the ""Expanded New York State Wine Messaging Content"" section, how much additional messaging do you want? A certain number of pages of content or messages? For example, 5-10 messages per audience? Or messaging for a specific type of media outlet? Or each of the 4 audiences have something like the below?**

- Strategic headline
- Mini brand messaging (for smaller spaces like ads, social, etc.)
- Full page brand story (full page on website)
- Call to Action

We would like to see what your company suggests for NYWGF based on your assessment of our goals, capacity, and budget.

**Do you have a list of deliverables you would like to see for the 5 toolkits that are listed under "Marketing Partners?" We have seen a huge variance in toolkits. Some are 3 pages and others include many things, like Oregon. Should we go off this Oregon toolkit sample? <https://industry.oregonwine.org/resources/toolkits/oregon-wine-month/>**

We would like to see what your company suggests for NYWGF based on your assessment of our goals, capacity, and budget.

**For the campaign assets "New York Wine Month Campaign Toolkit" - Do you want this to just be messaging? Or also include an ad campaign with logo, design, messaging, and images promoting New York Wine Month? Similar to what is provided here: <https://industry.oregonwine.org/resources/toolkits/oregon-wine-month/>**

The toolkits should have all the basic elements (messaging, logo, design, suggested images, etc.) necessary to launch a



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campaign for retailers and restaurants with instructions on how to adjust for channels (in store vs. online) etc.

**For the toolkits - what exactly do you envision these would entail? I see these as a digital compilation of the materials we created in Phase I, plus brand guide, brand overview, the Course & Reference Guide, and the additional deliverables included in this RFP What else should be part of these toolkits?**

We would like to see what your company suggests for NYWGF based on your assessment of our goals, capacity, and budget.

**New York Wine Month - what campaign development has been conducted to date? Do you have any resources you can share?**

No campaign development has been done.

### TRAINING

**Are there barriers with the different stakeholders to adopt statewide materials? Are the barriers different by stakeholder?**

There are barriers with key stakeholders that can be shared further with the successful bidder. NYWGF can provide access to some research already done on perception of NY wines both domestically and internationally as well as perception of statewide brand by wineries. Barriers are indeed different by stakeholder.

**Has Boldly, NY. been embraced by your stakeholders, are growers, trade etc. using that language. Why you think that is the case, why not. Can you expand on that?**

It is our perception that the Boldly, NY. brand is becoming more widely used and accepted by industry, trade, and media. Consistent utilization of the tagline/logo in marketing activations over the past 2 years has been key. The brand is attracting national and international wine critics (e.g., Eric Asimov, Jancis Robinson, James Suckling, Kevin Zraly) to engage more and write about what is happening in the New York wine industry.

**Training: Is this just the plan to onboard, or does it include actual training of key partners? How many key partners here? It looks like there are 4-5 major categories to consider.**

Great question. The 'ask' is definitely for the creation of the plan to onboard AND the actual delivery of the training to key constituents. The groups are (1) Market Representatives (2) Wineries (3) Growers (4) Trade & Media (5) Restaurants & Retailers

**For the training piece you have created quite a bit of content already, is part of the ask to make sense of what you already have and package it? If so, how much of it you think is new material versus existing. Where do you think you are falling short?**

The successful partner would develop all deliverables requested in the RFP (which includes a significant amount of new



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content and assets) and then develop a training plan for our key constituents as noted in the RFP, and deliver that training. Please see above.

**For the "Brand Training Curriculum, and Schedule for Onboarding Key Partners" - are you looking for anything specific type of training here? I saw Oregon did webinars to support PDFs and downloads. We could also do this through an online course. Or we could expand any existing brand guides to include messaging. Any preferences?**

We are open to all options that would make the training as accessible and engaging as possible for our audiences! We would like to see what your company suggests for NYWGF based on your assessment of our goals, capacity, and budget.

### WEBSITE

**You are asking our advice on the website but overall, what do you think ought to be the main goal of the website?**

The website serves multiple audiences with two main functions: 1. Providing info on NYWGF and the ways that it serves the industry. (Membership, research, etc.) 2. Telling the Story of New York Wines to trade/media/consumers. (Storytelling, facts & figures, etc.) \*However, we are NOT looking to become a tourism focused organization. We want to tell people WHY they should be interested in NYW, and ideally how to find it, but not down to the granular level of individual winery offerings, events, etc.

**Website Audit and Suggestions – does this evaluation anticipate a website overhaul or refinements to the existing site for consistency in messaging and execution?**

Likely refinements to the existing site. We do not plan to change hosting, CMS, etc. But we are open to major restructuring if it is determined to be necessary.

**The current site is very well done. As we look to become partners to help, can you advise if you use Google Analytics, Google Tag Manager and/or other third-party tools to help you analyze, evaluate, track, and engage with visitors better using your site.**

Google Analytics is active, but not being analyzed thoroughly. Any guidance/framework on how/what to track would be welcome.

**Besides Google Analytics data, do you have other sources of data on which we can base the audit of past performance?**

No.

**Do you want the audit to expand past the website? We usually include other digital channels: Email marketing, social media, digital advertising, etc. These are all part of the same ecosystem, and we like to look at full-spectrum digital marketing and not just the website to give better insight.**

Yes, happy to look at the full picture to help define the overall digital strategy