

Policy: OSAs will have a completed Independent Contractor Agreement on file in Human Resources prior to any activity as an OSA. The Agreement includes sections on: Term & Termination; Contractor Services; Independent Contractor Status; Ownership; Confidential Information; Non-Compete; No Poaching; Use of Contractor's Name; Picture and Professional Background Information; Liability; Disclaimer of Warranty; and Miscellaneous Provisions. A Schedule of Services and the National Sales Support Fee Schedule are attachments.

Ambassadors who work off site will be accountable for their samples, sales and order entry.

OSA compensation is commission only. Non-commission activities (events, demos) will be compensated through the National Sales Support Fee Schedule.

OSA's will submit documentation on time to OSA Program Coordinator, SAA or designee.

Procedure:

Application

- Interested candidates are required to fill out an initial application form and submit to ambassador@wv.com.
- Qualifying candidates must be 21 years of age. The candidate will conduct a minimum of one phone or Skype interview with HR.
- Upon selection, the new OSA will be required to sign a Confidentiality, Intellectual Property and No-Poaching Agreement and Independent Contractor Agreement outlining the program expectations along with policies and procedures that must be followed.
- Application and selection documents and Confidentiality Agreements will be kept on file by Human Resources. Independent Contractor Agreements will be kept on file by Human Resources with copies provided to Accounts Payable.

On Boarding

- OSA Program Coordinator, Sales Admin Asst or Designee
 - Adds OSA to wv-OSA@wv.com email list
 - Enters OSA Contact Type in WineDirect
 - Receives log in access to website
 - Emails OSA Self Study Materials (HR/Public/Self Study Materials), including Self Study Modules 1-6, Quiz and Quiz Answer Sheet.
 - Scores and provides feedback on Quiz Answers.
 - Adds OSA to private group page for support with other OSA's
- OSA
 - Reviews Self Study Materials
 - Completes and returns Quiz Answer Sheet to Sales Admin Asst
 - Reviews OSA related P&Ps
 - Obtains any and all required State regulated licenses for their activities. The ~~Sales Coordinator~~ Regional Brand Manager will work with the OSA and compliance to obtain any required registration or license for work requested to directly support National Sales efforts. Fees incurred for National Sales efforts will be reimbursed when approved by National Sales.

Launching Business

- A starter kit will be purchased by the new OSA for \$ 75.00 containing:
 - First wine sample pack of 4 bottles of wine. This will be shipped or available for pick up at the Estate Tasting Room free of charge.
 - Training & sales materials, including winery information, wine tasting notes.
 - Wine Key.
 - Printable marketing tools
 - National Sales Compensation Tracker
 - OSA daily sales tracker

Off-Site - Ambassadors (OSA)

SALES-DIRECT AMBASSADOR

WILLAMETTE VALLEY VINEYARDS

- State Licenses Information
- Business reply envelopes.
- Pricing and shipping rates.
- Sample Contact Card.
- Order forms.
- T-Shirt.
- Name Tag.
- P&P's
 - Discount (OSA's are eligible for 50% discount on 1 case of wine per month, up to 12 cases/yr)
 - Shipping
- Business Cards – first set of cards. Additional cards can be ordered via the Sales Admin Asst or designee at cost. Title on Business Cards should read "Winery Ambassador".
- Sales Admin Asst or Designee will:
 - Email the OSA the following spreadsheets that will be used to report activities:
 - OSA Contacts
 - OSA Daily Sales Tracker
- Prior to the first event the OSA will:
 - Review all materials and become familiar with the wines that will be presented.
 - Visit the WVV website and become familiar with it, including but not limited to how to place an order, where to find tasting notes, where to find information about the founder, the tasting rooms, etc.
 - Submit order form for review of pricing and vintages to OSA program coordinator, Sales Admin Asst. or designee

Organizing Events & Developing a Customer Base

- OSAs are encouraged to network and host their own wine tastings, wine dinners and events. These are planned independently with no supplies or reimbursements made by WVV.
- WVV may help promote an event if given 30 days' notice with full event details emailed to Marketing.
- Customers added to WineDirect, will remain the OSA's customer unless there has been no sales recorded within 1 year.

Submitting Orders for Fulfillment

- OSA will have order forms in their starter kit to use for each event, and more may be printed by the OSA.
- Within 48 hours of an event or sales purchase the OSA is required to do one of the following:
 - Order should be processed online as follows:
 - Go to <https://www.wvv.com/OSA-Resource-Page>
 - Enter the customer's order in google form
 - ~~When order is complete,~~ Fill out google form completely
 - Submit google form with order when complete
 - You will receive email notification of the order submission
 - OSA manager will fulfill order
 - Immediately shred customer personal information
 - Enter any notes, if appropriate
 - Email the OSA Manager or designee the completed "Contact" spread sheet listing guests in attendance who did not order wine.
- WVV guarantees to ship wine within 2 business days of order being input with shipping tracking emailed back to OSA if requested. If extreme temperatures prohibit a wine from shipping, the Shipping Manager will work out details with OSA per P&P: Extreme Weather Shipping.

Contact Management

- In the starter kit is a sample contact card. WVV recommends these to be used capture customer data for follow-up sales opportunities.
- Contacts obtained during a tasting that did not purchase should be turned into WVV. These contacts will be entered into WineDirect under your "contact type" and if a sale is completed within 90 days the OSA will receive credit.

- WVV recommends the OSA contact their customers at a minimum of 2x per year. If a sale is not made at least 1x per year, the customer is eligible to be redistributed to other WVV Winery Ambassadors.
- Contacts created through WVV activity remain the property of WVV and may not be used by OSA for any other purposes outside of business related to WVV. As such, WVV reserves the right to redistribute OSA leads at any time for any reason.

Reordering Sample Wines

- To reorder wines for samples, submit a request to the OSA Program Coordinator, SAA or designee via email, including a list of activities for the sample use. Samples are charged at 30% of their retail price and shipping 50% of retail price. Samples will also be available for pick-up in the Estate Tasting Room. A current list of available wines and vintages will be made available to each of the Ambassadors on a monthly basis Via Drop Box, Google Docs or other means. Ambassador is responsible for their own samples.
- Samples ordered will be reviewed by the OSA Program Coordinator, SAA or designee to ensure that sample utilization is consistent with tastings/events/dinners and wine sales.

Commissions (Commission rates are confidential and protected. Rate is disclosed in P&P housed on the server in the P&P/Private/Sales folder)

- Offsite Ambassadors will receive 25% commission on all current release wine sales.
- Offsite Ambassadors will receive 15% commission on private label sales (reduced to compensate for label design, print, and hand label application). Complimentary shipping is not available for private label orders.
- OSA will be paid a pre-determined flat amount (see Event Compensation Request form) for any scheduled WVV support activities which are pre-approved by the OSA Program Coordinator, SAA or designee in which the OSA does not have an opportunity for direct sales.
- Shipping charges are not eligible for commission.
- Accounting will calculate commissions.
- Commissions will be paid on the 25th of the month for the previous month's sales. In order to receive your monthly commission check, all supporting documentation must be submitted for approval & review by the 5th of the following month to the OSA Program Coordinator, SAA or designee.
- If an existing customer of WVV attends one of your events and makes a purchase, the commission from that sale will be split as follows: Currently assigned WVV Winery Ambassador (10%) OSA (15%), as long as proper contact has been documented in the WVV WineDirect database. Accounts will be audited by OSA Program Coordinator, SAA or designee.

National Sales

- OSA does tasting demos in coordination with Regional Brand Manager in select markets.
- Contact Sales Coordinator to request permission prior to contacting or scheduling an event at a public location.
- If an event is held at a public location, coordinate with the Regional Brand Manager who supports the state.
- To receive compensation for any public events done in support of National Sales, OSA must include the below with their invoice:
 - Date, duration, and type of activity, location (account name & address)
 - Name of point of contact at account & contact information
 - Recap of activity (ex. Quantity and types of wine poured and sold, feedback from guests/attendees)
 - Expenses incurred – must include itemized receipt(s) and be in line with the Travel P&P
 - Mileage – must include departure location and destination location and number of miles driven

Management

- OSA Program Coordinator/Sales Admin Asst/Winery Ambassador Lead are available for support.
- OSA will submit a monthly activity recap of prior month activities by the 5th of the month.
- OSA Program Coordinator, SAA or designee will
 - regularly check in with OSA regarding ideas, performance questions and review.
 - send a monthly communication to all OSA's with updates on the winery, inventory changes, pricing changes, and sales goals/updates.
 - Reviews OSA recaps

Attached: (Departments/Direct Sales/Public/Forms) OSA Contacts

**Off-Site - Ambassadors
(OSA)**

**SALES-DIRECT
AMBASSADOR**

**WILLAMETTE VALLEY
VINEYARDS**

Signature:

Department Manager

Date

CEO

Date

OSA Contacts

Date:	Complete one contact form for each event.						
Event:	Enter guests who did not place orders.						
Location:	Email to ambassador@wv.com no later than 2 days after the event.						
OSA Name:							
Last Name	First Name	Phone	Email Address	Street Address	City	State	Zip