

WINE BUSINESS MONTHLY

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that Cater to the Small Winery

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**The Next Step in Small-batch
Fermentation Tools**

**New York Wineries Band Together
to Target European Exports**

**Technical Spotlight: Automating
the Sparkling Process**

Barrel Management Systems for the Smaller Operation

Andy Starr

Andy Starr is an entrepreneur, marketing and strategy consultant, and winemaker with over 30 years experience in new technology and new market development, and in building organizations. His company, StarrGreen LLC (www.starrgreen.com) assists clients in the wine, beverage alcohol, and greentech industries. Best known as the Founder of Neocork Technologies, the synthetic cork pioneer, Andy built the company from an unfunded business plan through R&D, manufacturing and marketing, ultimately shipping Neocorks to 19 countries. He has six years of winemaking experience, highlighted by two years as the award-winning head winemaker for Yarden, Israel's first super-premium winery.



SCOTT SUMMERS

ACCORDING TO A *Wine Business Monthly* survey that appeared in the December 2018 issue, just 9 percent of small wineries and 35 percent of medium to large wineries use a barrel barcoding system. It's surprising, as there are systems to track these valuable barrels and their contents.

Most wineries still track their cooperage and contents by handwriting on index cards tacked to barrels, making notes on clipboards, then re-entering all that data into an unwieldy spreadsheet. This method is filled with errors, doesn't provide informative reports, and is drudge work that diverts time away from making better wine. On the plus side, ink on index cards is the way they did it in France in the 19th century; so if this is your method, tradition is on your side.

For a small winery, more modern systems are out there and well worth using. Think about it this way: if you're crushing 100 tons of grapes that will need to be barrel-aged, you'll have about 300 barrels per vintage. If 50 percent of those wines are reds and stored beyond the next harvest, then you have 150 more, or roughly 450 barrels, to track by varietal, vineyard block, harvest date, fermentation style, cooper, forest, toast level, barrel age, etc., plus a couple you think may have Brett.

For each of these barrel lots you need to keep tabs on SO₂ levels, topping schedules, time in barrel, and malolactic status. You need to know which are empty, sanitize them on schedule and take them off the sanitizing schedule once refilled. Financially, you must forecast how many barrels to buy, and

how many to retire and sell. If you make a label claim like "30 percent new French oak," you have to make an accurate calculation to back that up.

A barrel management system is a significant piece of an overall cellar management system that covers everything from incoming grapes to bottled wine—so you're really making a production software selection. In addition to the winemaker and finance manager, the selection process should include the cellar master and cellar crew as they will use it every day.

I asked **Mike Blom**, a partner at **Top It Off Bottling** in Napa, Calif., who has led barrel storage facilities since 2005, about decision criteria for choosing a barrel management system. He recommends winemakers "define what's important to you," whether it is data to capture for future blends, streamlining everyday tasks or simplifying the interface between production and accounting. Blom cautions that "the greater the level of detail, the greater the level of administrative burden. If you walk out into your cellar and see everything, that may be enough for you."

These are some of the leading barrel management software providers. All of these providers charge users a monthly subscription, sometimes based on winery size, plus a range of set up fees and/or training fees. Some require purchase of a rugged hand-held bar code scanner at \$2,000 to \$4,000 each and dedicated printers that cost \$1,000 to \$2,000, and others let you use your cell phone and your current laser printer.

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Tonnellerie de Mercurey USA, Inc
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Tonnellerie de Mercurey, Oregon
corey@enologygroup.com
971.237.5071

www.tonnellerie-de-mercurey.com

Barrel Management Systems for the Smaller Operation

InnoVint

Ashley DuBois Leonard, InnoVint's founder and CEO, is a UC Davis graduate who spent 8 years in wine production and managed barrel inventory. DuBois Leonard saw the need for a "mobile production system that can collect data from anywhere in the lab, winery or vineyard, and be retrieved anywhere at any time by anyone." So she started InnoVint, which has grown over the past six years to help more than 600 wineries, 40 percent of whom produce less than 5,000 cases annually.

DuBois Leonard stated her goal is to take out the grunt work and "enable the people in the winery to do their best work." To that goal, InnoVint was designed so that the customer can start using it with only minimal on-boarding and training, and without the need for expensive hand-held scanners. InnoVint's workorder system has many built-in templates, as well as preloaded databases for lists, such as cooper names and forest appellations. DuBois Leonard added that "a small winery can have InnoVint implemented in a day."

Jordan Jeffries is the associate winemaker for Davis Estates in Calistoga, a 12,000-case operation that stores 909 French oak barrels from 15 different coopers. He chose InnoVint after seeing it in use at another winery. He thinks it is user-friendly and intuitive. "It's very easy to figure out what the buttons do. You can teach yourself, and you don't have to walk back to your desk to re-enter data," Jeffries said. He also liked that he didn't need to buy any special hardware.

Getting started with InnoVint was very easy for Jeffries. As new barrels arrive at the winery, the system creates a unique barrel label with a QR code, plus identifying text. When someone fills the barrel, they scan it and claim it as full, and vice versa. Staff use their phones or iPads, and temporary workers use an inexpensive iTouch loaded with the software. "I think it's going great," Jeffries said.

In a small winery, the winemaker is often away from the winery doing sales. Jeffries was travelling when he received an important email from his cellar master. As InnoVint is cloud-based, he replied to the email and wrote detailed, unambiguous workorders directly from the system.

Jeffries loves how much data entry time InnoVint's barrel management system eliminated, noting, "I don't have to rearrange a large Excel spreadsheet each time I fill or empty," which frees up a significant amount of time for tasting, blending and quality control. As he walks through the winery to taste barrel samples, he can see all of a barrel's wine information on his iPhone.

Ronald Du Preez, general manager/partner at Sugarloaf Crush in Santa Rosa, is an InnoVint user as well. Sugarloaf is a custom crush facility, processing 1,500 tons of grapes and storing 5,200 barrels for 40 clients, so data quality, barrel organization and space optimization are the most critical features. A future plan will use the InnoVint's vessel tagging system to indicate a barrel's precise location within the facility. (For example, row 13, stack 3, barrel height #2.) This will make barrels easy to locate and eliminate time wasted trying to find lost barrels. Using InnoVint, he can easily tell his clients when their barrels were last sulfured or topped.

Du Preez likes that he can use his iPhone instead of an expensive bar code scanner but cautions that the phone must be within 2 feet of the barrel. Prior to InnoVint, Du Preez used physical cards on the barrels, lots of ink, and many hours of data entry into Excel spreadsheets. "For a 25,000 case winery, this is a really cool system." When clients "graduate" from his facility into their own winery, they typically continue to use InnoVint.