

## CASE STUDY

# Turning Customer Data Into \$9,500 in Sales — Before Noon

Local Niagara Winery · AI-Powered Sales Outreach

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## \$6,000

**Cab Franc Sales**  
from targeted morning calls

## \$3,500

**Additional Case Sales**  
Rosso + Pinot Gris — same day

## \$9,500

**Total Revenue**  
generated in a single morning

### THE CHALLENGE

A local Niagara winery was seeing slowing momentum mid-month on both a Case Discount promotion and the clearance of their 2017 Cab Franc. Rather than sending another broad email blast, the team looked for a smarter approach.

### THE APPROACH

Using AI-powered customer data tools, the sales rep analysed purchase history and tasting records to identify customers with a proven affinity for Cab Franc. Instead of a mass email, a targeted call list was built from warm, qualified leads.

Customer tagging was also leveraged — segmenting by case purchase history and wedding-related enquiries — to re-engage a high-value couple who had been on the fence.

### WHAT MADE IT WORK

**Data-Driven Targeting:** Tasting history identified Cab Franc enthusiasts before dialing.

**Customer Segmentation:** Tagging by purchase type surfaced a high-intent couple for case sales.

**Warm Outreach:** Every call went to someone already primed to buy — no cold prospecting.

**Future Pipeline:** A Cab Franc segment is now built for re-engagement at Appassimento season.

### RESULTS BREAKDOWN

Product	Qty	Revenue
2017 Cab Franc	Multiple btls	\$6,000
2020 Rosso	8 cases	
Pinot Gris	8 cases	~\$3,500 comb.
<b>Total</b>		<b>~\$9,500</b>

### LOOKING AHEAD

With a dedicated Cab Franc segment now tagged and tracked, the winery is positioned to re-engage these buyers for upcoming Appassimento releases — expecting even stronger conversion through hyper-targeted holiday outreach.

*“Instead of casting a wide net, I was speaking directly to warm, qualified customers who were already primed to buy.”*

— Sales Representative, Local Niagara Winery

## Ready to Sell Smarter?

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