

PRINT

# WillaKenzie Estate Customer Visits

EMAIL

Enter all critical information in Outlook and Email BL and JL.

WKE Person Contacted \_\_\_\_\_ Date \_\_\_\_\_ Source \_\_\_\_\_

*\*Return contact with customer must be made within 48 hrs.*

## **VISITOR INFORMATION** - Filled Out by Original Contact from Above

Name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

Type of visitor (consumer, distributor, sommelier etc.) \_\_\_\_\_

Visitor Information (e.g. Owner of large restaurant/hotel chain etc) \_\_\_\_\_

## **RESERVATION INFORMATION** - Filled Out by Original Contact from Above. Send form to BL & JL.

Reservation Made With \_\_\_\_\_ On (Date) \_\_\_\_\_ Source \_\_\_\_\_

Date of Visit \_\_\_\_\_ Time of Visit \_\_\_\_\_

WKE Visit Host \_\_\_\_\_ What wines are they interested in? \_\_\_\_\_

# of Guests \_\_\_\_\_ List of visit request (tasting, tour etc.): \_\_\_\_\_

## **VISIT INFORMATION** - Filled Out by WKE HOST and Sent to Original Contact, BL & JL

Who greeted the customer \_\_\_\_\_ Arrived at \_\_\_\_\_ Departed at \_\_\_\_\_

Describe the visit (tour, cheese plate etc.): \_\_\_\_\_

What wines were tasted: \_\_\_\_\_

Wines Purchased: \_\_\_\_\_  CC Sign-Up?  Email Sign-Up?

Customer comments and feedback (be specific): \_\_\_\_\_

## **POST VISIT FOLLOW-UP** - Filled Out by WKE HOST

WKE Employee Name \_\_\_\_\_ Date of Contact \_\_\_\_\_

*\*Customer out reach must be made with 24 hours of visit*

What type of contact (email, phone etc.) \_\_\_\_\_

Follow-up Notes: \_\_\_\_\_