



POST-HARVEST CHECKLIST FOR WINERIES

HOW TO PREPARE FOR YEAR-END

Harvest is over and now it's time to look back at your accomplishments over the last year and look for ways to improve operations in the future.

Developed by our team of wine industry experts, this guide focuses on key areas that affect your productivity and profitability. Use the checklist to define actionable areas to optimize processes and create a more structured and efficient winery business.

Cheers to ending another successful year and planning for the next one. To learn more about Crafted ERP Winery Edition, visit us at craftedERP.com or email cheers@craftedERP.com.



STEP 1: EVALUATE CHALLENGES AND SUCCESSES

What went well during this year's harvest? Where are there opportunities for improvement? Invite feedback across every level of your organization.

STEP 2: FINALIZE EXPERIMENTS AND TRIALS

Wrap up any active winemaking experiments or research. Enter critical information into your database to resume trials in the future.

STEP 3: PERFORM QUALITY ANALYSIS OF NEW VINTAGES

Enter tasting notes in your sensory panel to establish a baseline to review and build off of year after year.

STEP 4: ANALYZE YIELDS (PLANNED YIELD VS. ACTUAL)

Your crush cellar orders have tracked your yields for the vintage. Now you can go through and build out reports or searches to analyze the data.

STEP 5: WINE PROCESSING

Create custom cellar order templates to streamline bulk wine processing.

STEP 6: PLAN PRODUCTION

Utilize demand planning and manufacturing task schedulers to plan all "just in time" materials for bottling, helping limit downtime on the line.

STEP 7: PREPARE YOUR R&D TAX DEDUCTION

Compile information on all activities related to research, product development and agricultural experimentation to submit for tax credit.

STEP 8: BUILD GOALS AND BUDGETS

Compare results from one, three and five years ago to gain a better understanding of your YoY performance.

STEP 9: THINK ABOUT YOUR TEAM

Review your org structure with your leadership team. Are you staffed properly? Do you need to restructure or realign areas?

STEP 10: INVESTIGATE AND INVEST IN NEW TOOLS

Review your current software systems and evaluate if a more modern solution will help you achieve your business goals.