

# Integrating CSA Platforms into the Overall Farm Marketing

Looking at Harvie and CSAWare and integrating them into overall communications.



As a small farm and a small business, we have an expansive view of “marketing” that sees most touch points with customers as potential marketing.

All communication with your customers and potential customers is marketing.



# Marketing and CSA Software

Your CSA Software can be:

- One of the ways customers find your farm
- The main point of contact where you close a sale
- An administrative tool that allows you to offer better service or more streamlined service to your customers.

Your CSA software:

- Will shape how and when you communicate with customers.
- Will provide some functionality for e-communications with specific customer groups.
- Will be the base around which you have to build farm policies, deadlines, etc
- Can provide a platform to upsell and meet additional customer needs

Seeing your sales or CSA Software as a marketing tool, will allow you to communicate better with your customers.

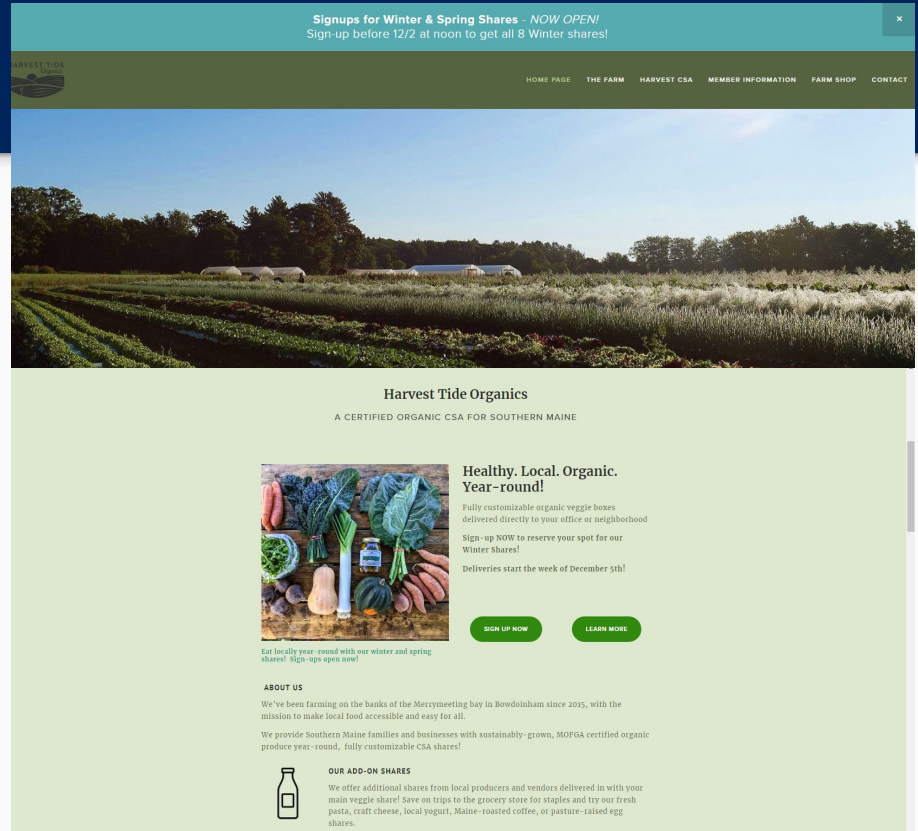
# A little about Harvest Tide Organics

- Started growing in 2015 with 65 summer CSA members, 25 winter
- Now 980 Summer members, 750 Fall, 350 Winter, 300 Spring 40+ delivery site (public and private), home delivery
- Grow on 25 Acres in Southern Maine
- Most of our sales are through a customizable year-round CSA, mostly delivered off-farm to more populous areas south of us
  
- We have a high admin capacity and have high standards for customer service, but did not start out that way. Improved once delegated.
- Have awesome admin staff person who also manages the greenhouse so her admin workload varies from 90% (winter months) to 50% of what she does



# Software Basics at Harvest Tide

- **Squarespace for website, have used this the whole time and slowly updated it.**
- **Email: started with Mailchimp, trialed Convertkit (didn't stick), made major switch the Constant Contact with CSAWare and like it**
- **We are not super high tech, we are middle of the road in terms of website awesomeness and branding.**
- **We are not maximizing our use of mailmerge software or other marketing tools.**



# Evolution of our CSA with Software

## HARVIE

  
a service of [localharvest.org](http://localharvest.org)

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- 2015 - Started by keeping track of payments in spreadsheets and using storefront on squarespace offered pay in full and installments
    - Lots of chasing people down and not getting paid, but already some level of convenience for
  - 2017 - Switched to Member Assembler - (now defunct) but was super helpful with automatic payments
  - 2019 - Added Customization with Harvie
  - 2022 - Switched to CSAWare in Fall

# CSA Software and Marketability of Your CSA

We've found that adding CSA management software has for the most part added a level of convenience to the customer that make our shares significantly more marketable just by the way they increase convenience and flexibility for the customer.



- Ability to pay with credit card, automatic payments, and flexible (spread out) payment plans options
- Customization of share contents
- Rescheduling capacity for shares
- Autorenew!
- Add-ons shares and week to week extra sales

## Factors in marketing for our farm in selecting CSA Software

### Direct Marketing/Contact:

- Email service to customers/potential customers
- Presentation of the storefront
- Control of branding and farm messaging

### Indirect Marketing/Contact:

- Customer ease, usability and transparency
- Customer's access to farm messaging, policies, and customer service





# General Presentation to Customer Storefront



## Harvie

- Color scheme and layout not customizable
- Centers lots of Harvie branding
- Still looks nice and is appealing
- BUT focus on Harvie branding is confusing to customer.
- Extras sales are easily accessible to customers

## CSAWare

- Very customizable in terms of language, layout, messaging
- Messaging centers farm not software
- Easier to tie into your current website look for more seamless transition between sites
- Also make it easier to post the link as a stand alone
- Also has easy access to farm specific policies and messaging (FAQ, contact us)
- Extras sales require more click throughs and searching for products



### Vegetable CSA Shares

2022-2023 Winter Harvest Share

2023 Spring Vegetable Share

### Shop Local Add-Ons

Coffee

Dairy & Eggs

Fruits

Grocery

Jarred Goods

Meats

SPRING Add On Subscriptions

WINTER Add On Subscriptions



## About our CSAs

**Fully customizable, organic veggie boxes delivered directly to your office or neighborhood!**

Each delivery we offer a diverse selection of seasonal, MOFGA certified organic veggies grown right here on the farm at Harvest Tide Organics.

With our customization platform you can set your preferences, and the system will build a share for you each delivery based on what you like, and what we have available. Log in to your account each delivery during the customization window to swap items, add extra veggies, or purchase even more delicious products like apples, bacon, cider, oats and more from the local businesses we partner with.

We deliver in Bowdoinham, Brunswick, Freeport, Yarmouth, Falmouth, Cumberland, Portland, South Portland, Westbrook and Scarborough, and offer home delivery, private employer drops, and public pickups.

We hope you'll join us for a great season of local produce!

## Vegetable CSA Shares



### 2022-2023 Winter Harvest Share

Bi-weekly deliveries of fully customizable boxes filled with certified organic, Maine-grown veggies grown on our farm in Bowdoinham, ME.

Prorated for signups after 12/05/22



Frequently Asked Questions

Pick-up Locations

Policies

Contact Us

From a recent photo of our CSAWare storefront you can see that the farm is front and center. No CSAWare branding or messaging to be seen!

# Email Considerations

The email service attached to your CSA (or other sales software) will affect how efficiently you can communicate and market to your customers.

## Harvie

- Has in software email service
- Can sort customers by season and several other functionalities for simple customer communications
- But not granular (email people who had turnips last week – need to contact Harvie for this level of functionality)
- Email functionality is pretty easy to make look nice and be functional
- Has image storage associated with email

## CSAWare

- Has in software email service
- Can sort customers by season and several other functionalities for simple customer communications
- Much more granular than Harvie
- Email functionality is clunky
- Has a really cool “drop notes” function that allows for easy insertion of customer information making it easier to streamline individualized communications
- Also has capacity to sync with Constant Contact which can make your CSA emails look much nicer and more professional

# Other email considerations

Email is the primary manner we communicate with customers.

- What ways are you currently emailing with members?
- What reminders, newsletters, information updates do you do regularly that improve and streamline the customer experience?
- One big difference between the Harvie and CSAWare systems is the level of control you have over which emails go out, how customizable they are, and how much they center YOUR brand and messaging.



**Big winner here – CSAWare!**

Nearly every email confirmation, reminder, notice etc, can be edited to reflect your messaging and brand!

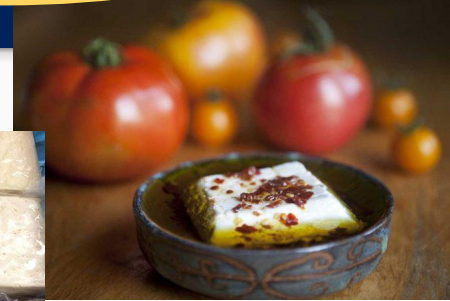
# Upselling and Extras

Offering additional local products can make your shares more marketable and appealing, and CSA software can make it easier!

- Your CSA Software will affect product presentation
- How you reach customers to let them know what is available
- How easily customers can add or adjust items each week
- Harvie makes it easier for customers to add items with a simple click and their display of extras on the same page as vegetable shares makes it very easy to click and add. But lots of scrolling.
- CSAWare requires more click through shopping, provides a slower, more traditional online shopping experience

Other factors related to your CSA Software:

-inventory tracking, factoring software fees into margin, ordering deadlines, admin capacity



# Control over messaging and customer care

Connecting with your customers, streamlining the CSA experience, and ensuring great customer service is a critical but subtle part of member retention

## Harvie

- **Pushes itself to the forefront of display and communications**
- **Inserts itself in customer service, responds to emails**
- **And gives BAD service, lots of lost, long delayed reply emails**
- **Gatekeeps official policies regarding cancellations, refunds etc.**
- **Takes way to long to reply**
- **This lack of control also plays out in emails and other customer communications**

## CSAWare

- **Centers farm and farm messaging**
- **Does not provide any customer service to members – all email links and contact links lead directly to the farm**
- **This allows you (farm) to own and control service, WAY better customer experience, turn even negative experiences into bad ones**
- **Provides critical front and center space to farm policies and FAQ □ more clarity and better experience for customer**

# Other factors to consider that affect marketing and sales (and overall functionality for farms)

## Availability of auto-renew

- (Harvie currently offers, CSAWare is working on it, but not live yet)

## Software brand outreach

- CSAWare is hosted by Local Harvest which is a local food search tool
- Harvie has a national presence, calls users “Harvie Farms”

## Cost

- Harvie is a lot more expensive!
- CSAWare is more affordable!

## Mission of Software

- Harvie really pushes certain goals on farms (aggregation, year-round, pay as you go) as helpful for profitability, has certainly found some winning options, but offers little flexibility for YOUR farm.
- CSAWare is slightly less adapted to certain kinds of sales for your CSA, but is very flexible, centers farms, and is very accessible and open to feedback



CSA software is expensive, but valuable. What you chose should enhance your sales, add value and convenience for you and your customers, and work for your farm daily.



# HARVEST TIDE

*Organics*



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**Thank you!**

