

Wine Club Audit Checklist

Evaluate Your Current Offerings & Uncover Opportunities for Growth

Use this quick-hit audit to assess your current wine club model and identify key areas for improvement—whether you're just getting started or ready to take your club to the next level.

1. Member Onboarding

- ☐ Welcome email or onboarding series in place
- ☐ Personalized thank-you or intro call from staff
- ☐ “Welcome Packet” or digital guide provided
- ☐ Clear communication of next steps post sign-up

2. Club Structure & Value

- ☐ Multiple tiers or flexible shipment options
- ☐ Benefits clearly communicated (discounts, exclusives, etc.)
- ☐ Competitive pricing and structure
- ☐ Club shipments are customizable

3. Conversion Tactics

- ☐ Tasting room team trained to promote the club
- ☐ Signage and marketing materials visible onsite
- ☐ Seasonal incentives or time-sensitive promos used
- ☐ Visitor emails captured for follow-up

4. Communication & Engagement

- ☐ Personalized emails based on behavior/preferences
- ☐ Birthday or milestone outreach
- ☐ Club-exclusive events or behind-the-scenes access
- ☐ Social media content tailored to members

5. Churn Prevention & Retention

- ☐ “Pause” or “Skip Shipment” options available
- ☐ Exit survey sent to canceling members
- ☐ Follow-ups with at-risk members (e.g., skipped customization)
- ☐ Re-engagement campaigns in place for lapsed members

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6. Technology & Reporting

- ☐ Integrated POS, ecommerce, and wine club tools
- ☐ Mobile-friendly sign-up & member portals
- ☐ Easy self-serve updates & customization
- ☐ Regular review of KPIs: AOV, churn, growth, LTV

Scoring

For each section, rate yourself:

4 = Best-in-Class | 3 = Solid | 2 = Needs Work | 1 = Not Yet in Place

Next Steps

- Identify your top 2–3 opportunities for growth
- Assign owners and target completion dates
- Revisit this checklist quarterly to measure improvement

**Want help optimizing your wine club experience?
Contact our team for a personalized consultation.**