



# Building a Wine Club that Fits Your Winery

Club Design and Strategy

## Start With Your Why

Why are you launching a club now?

What do you want it to do for your business, beyond revenue?

- Improve customer retention
- Increase visit frequency
- Pre-sell small-lot or seasonal wines
- Build a loyal brand community
- Ground the decision in strategy, not trend

## Clarify the Customer Relationship You Want to Build

- How do you want members to feel?
- What kind of access do you want to offer them?
- What are they buying into besides wine?

*Your club should be an invitation into something meaningful, not just a way to move product.*

## Choose a Club Model That Supports Those Goals

- Revisit the six club models
- Match your club structure to your business goals and team capacity
- Emphasize that your club can evolve over time

*If you're not sure which model to start with, look at how your best customers already behave.*

## Make It On-Brand

*Think about voice, tone, perks, event types, and naming conventions*

Should it feel elegant, playful, rustic, exclusive, casual, experiential?

Reminders:

- Wine clubs are about access, not just discount
- Align perks and presentation with your brand identity
- Examples of personalized touches we've seen – be creative:
  - Wine crystal pairings
  - Jazz club memberships
  - Bring-Your-Own-Meat BBQ
  - Member-only bottles and release events
  - Private library tastings or harvest invites

## Ask These Before You Move On

- Does this club feel like us?
- Would we want to join this if we were on the other side of the counter?
- Can we manage this realistically with our current team and tools?

## Build the Framework: Mechanics & Logistics of Your Wine Club

Once your “why,” customer experience goals, and club model are set, it’s time to turn ideas into operational reality. A successful wine club doesn’t just happen—it’s engineered through thoughtful planning and precise execution.

### Membership Structure & Policies

- **Define Tiers & Benefits:** Decide if you’ll offer one membership tier or multiple, each with different perks, pricing, and allocation sizes.
- **Set Terms Clearly:** Outline member obligations (e.g., number of shipments, pick-up deadlines, cancellation policy, and payment schedule).
- **Legal & Compliance Considerations:** Ensure shipping regulations, age verification processes, and tax obligations are met for each state you serve.

### Inventory Planning & Allocation

- **Forecasting Needs:** Use historical sales data and production forecasts to determine how much wine to allocate for the club, including extra stock for replacements or reorders.
- **Reserve Special Bottlings:** Secure club-only wines or early releases to drive perceived value and exclusivity.
- **Coordinate with Production:** Align bottling schedules with club shipment dates to avoid last-minute shortages.

### Pricing & Payment Setup

- **Transparent Pricing Models:** Clearly communicate pricing per shipment or per bottle, including any discounts or added fees (shipping, handling, event tickets).
- **Automated Billing:** Set up your POS or club software to manage recurring payments, process renewals, and handle payment failures efficiently.

### Technology & Tools

- **Club Management Software:** Use a platform that integrates member records, order processing, shipping logistics, and marketing communications.
- **CRM Integration:** Keep a unified view of each member’s purchase history, event attendance, and engagement patterns.
- **Fulfillment Integration:** Partner with a fulfillment house or streamline in-house packing with clear processes for accuracy

## Marketing & Communication

- Plan Pre-Launch Buzz: Tease the club through email, social media, and tasting room conversations before opening sign-ups.
- Onboarding Experience: Create a welcome kit (physical or digital) with club details, perks, and a personal thank-you.
- Regular Touchpoints: Maintain a cadence of newsletters, event invitations, and personalized check-ins to strengthen connection.

## Launch & Rollout

- Soft Launch: Test the process with a small group of loyal customers to refine logistics before opening to the public.
- Official Launch Event: Host a release party, blending wine, food, and storytelling to bring the club to life.
- Post-Launch Follow-Up: Check in with early members to address any hiccups and gather feedback for improvement.