



DTC Program Health Checklist

A strong direct-to-consumer (DTC) program requires ongoing evaluation across operations, marketing, and customer experience. Use this checklist to identify strengths, gaps, and opportunities for growth.

Wine Club Health

- Membership churn rate is tracked and under control
- Average tenure of members is measured and improving
- Club options are clear, flexible, and appealing
- Benefits and perks are communicated effectively
- Referral and loyalty programs are in place

eCommerce & Website

- Website is mobile-friendly and optimized for conversions
- Online store offers seamless checkout and payment options
- Clear calls-to-action for joining the club, reordering, and booking visits
- Product pages include rich media (photos, tasting notes, food pairings)
- Customer data collection (emails, preferences, purchase history) is streamlined

Tasting Room & Hospitality

- POS is integrated with wine club, eCommerce, and inventory
- Staff are trained to convert visitors into members or repeat buyers
- Guest data is captured consistently (emails, visit notes, purchase behavior)
- Loyalty follow-ups are automated (thank you notes, reorder prompts)
- Events and experiences are designed to strengthen community

Marketing & Engagement

- Email marketing campaigns are segmented (members vs prospects vs visitors)
- SMS/text campaigns are used for timely promotions & events
- Social media presence is active, with storytelling and brand voice
- Paid ads are tested and measured for ROI
- Blog or content marketing strategy supports SEO & brand awareness

Customer Experience & Retention

- Personalized communications (first name, order history references)
- Members receive surprise & delight perks (exclusive tastings, gifts, offers)
- Retention metrics (LTV, repeat purchase rate, engagement) are tracked
- Surveys and feedback loops are in place
- Service response times are fast and friendly

Operations & Technology

- DTC systems (POS, eCommerce, clubs, shipping, compliance) are integrated
- Inventory syncs automatically across channels
- Shipping rules, taxes, and compliance are current
- Dashboards and reports provide real-time insight
- Data security and payment compliance are up to date

Scoring Tip:

Rank each item

Green = Strong

Yellow = Needs Attention

Red = Gap

This helps prioritize which areas to focus on for quick wins vs. long-term improvements.