



Partnership Readiness Checklist

Are You Ready to Convert Partnership Traffic Into Revenue?

Strong partnerships only work when the experience behind them is consistent, easy, and intentional. Use this checklist to identify gaps before launching or expanding referral and collaboration programs.

Experience Readiness

Can guests move through your winery experience smoothly?

Reservations & Guest Flow

- Reservation process is simple and mobile-friendly
- Guests can easily book online without calling
- Reservation confirmations are automated and clear
- Hospitality staff understands partnership programs
- Team knows how to identify partner-referred guests
- Walk-in overflow process is established
- Peak traffic days are operationally manageable

Onsite Experience

- Guest arrival experience feels welcoming and organized
- Signage and directions are clear
- Staff can confidently explain wines and experiences without intimidation
- Hospitality experience aligns with partner expectations
- Team can confidently recommend next steps (club, purchases, future visits)

Partner Hospitality

- Drivers/tour guides know where to check guests in
- Concierge and hotel referrals receive consistent treatment
- VIP or partner-specific perks are documented
- Staff understands referral incentives or promotions

Digital Readiness

Can customers easily act after discovering you?

Website & Mobile Experience

- Website loads quickly on mobile
- Reservation links are easy to find
- Wine purchasing is simple and friction-free
- Key information is visible:
 - Hours
 - Location
 - Tasting options
 - Contact information

Conversion Readiness

- Online store is easy to navigate
- Bottle images are clean and professional
- Product descriptions feel approachable and story-driven
- Club information clearly explains benefits and audience fit
- Website reflects the same experience guests expect in person

Partner Traffic Tracking

- Referral links or promo codes exist
- Website can track referral sources
- Google Analytics or CRM attribution is configured
- Partner-specific landing pages are available (if needed)

Offer Clarity

Do partners clearly understand what they are promoting?

Experience Clarity

- Partnership offer is clearly defined
- Guest benefit is obvious and easy to explain
- Staff can summarize the experience in one sentence
- Booking or redemption process is simple

Marketing Materials

- PDFs
- One-pagers
- Links
- Reservation instructions
- Brand messaging is consistent across channels
- Visual assets are current and professional
- Contact information is easy for partners to access

Value Exchange

- Referral incentives are documented
- Expectations are clear for both sides
- Partnership goals are defined:
 - Traffic
 - Club signups
 - Corporate gifting
 - Revenue

Follow-Up Systems

What happens after the guest visits?

Guest Data Capture

- Email capture is integrated into reservations or POS
- SMS opt-in opportunities exist
- CRM profiles are being built consistently
- Referral source can be recorded in CRM/POS

Post-Visit Communication

- Automated thank-you emails exist
- Follow-up offers are configured
- Club invitations are part of post-visit flow
- Abandoned cart or incomplete booking reminders exist

Retention & Relationship Building

- Guests receive communication beyond promotions
- Follow-up messaging feels personal and hospitality-driven
- Repeat visit strategy exists
- Corporate or referral guests receive tailored follow-up when appropriate

Internal Alignment

Who actually owns partnerships internally?

- Ownership & Accountability
- A dedicated partnership lead is assigned
- Staff understands partnership priorities
- Communication process with partners is documented
- Partnership performance is reviewed regularly

Operational Alignment

- Sales, hospitality, and marketing teams are aligned
- Staff knows how to handle referral issues or questions
- Internal notes/processes are centralized
- Team can scale partnership traffic operationally

Measurement & Optimization

KPIs are defined:

- Referral traffic
- Conversion rate
- Club signups
- Revenue generated
- Reporting cadence exists
- Underperforming partnerships are reviewed and adjusted
- Successful partnerships are actively expanded

Scoring Your Readiness

41–50 Checked

- Partnership Ready
- You have the systems and experience needed to support scalable growth.

26–40 Checked

- Growth Potential
- Strong foundation, but operational gaps may limit conversion or consistency.

0–25 Checked

- Build Before You Scale
- Focus on operational readiness before aggressively pursuing partnerships.

Why This Works

The biggest partnership failure isn't lack of opportunity, it's sending people into an experience that isn't prepared to convert them.

This checklist helps wineries:

- Identify operational gaps early
- Improve guest conversion rates
- Align internal teams
- Build partnerships that are sustainable and measurable
- Turn referrals into long-term customer relationships

Final Takeaway

Partnerships do not fix operational friction, they amplify whatever experience already exists.