



# Partnership Tracker & ROI Scorecard

Measure What's Working.  
Improve What Isn't.  
Scale What Performs.

## Introduction

The difference between a casual partnership and a true growth channel is measurement.

### Most wineries stop at:

- “They send us people sometimes”
- “That partnership feels good”
- “We should probably do more with them”

### This scorecard helps transform partnerships into:

- Trackable revenue drivers
- Repeatable systems
- Scalable referral networks

## How To Use This Scorecard

- Update monthly or quarterly.
- The goal is not perfection, the goal is visibility.
- Even simple tracking creates dramatically better decision-making.

## Partnership Tracker & ROI Scorecard

Partner Name	Partner Type	Referrals Generated	Visits / Reservations	Orders Generated	Club Signups	Estimated Revenue	Notes / Optimization Ideas	Evaluation
Example Hotel	Hospitality	24	18	12	3	\$4,250	Guests convert well on weekends	GROW
ABC Realty	Real Estate	10	6	5	1	\$1,200	Add welcome package insert	KEEP
Local Spa	Wellness	15	7	2	0	\$450	Audience mismatch	REWORK

## Part 1: Partner Information

### Who is driving traffic?

- Partner Name
- Business or organization name

### Examples:

- Boutique hotel
- Driver company
- Real estate group
- Financial advisor office

### Partner Type Suggested categories:

- Hospitality
- Driver / Tour
- Restaurant
- Corporate
- Real Estate
- Wellness
- Community
- Other

## Part 2: Referral Activity

*Are they actually sending people?*

### Referrals Generated

Track:

- Referral inquiries
- Referral codes
- Concierge recommendations
- Guest mentions
- Visits / Reservations

### Track:

- Completed reservations
- Walk-ins attributed to partner
- Tasting appointments

## Part 3: Conversion Metrics

*Did traffic turn into revenue?*

### Orders Generated

Track:

- Bottle purchases
- Ecommerce orders
- Follow-up purchases

### Club Signups

Track:

- Wine club joins
- Membership conversions
- Repeat customer indicators

### Estimated Revenue

Estimate:

- Tasting spend
- Wine purchases
- Club value
- Repeat purchases when possible

## Part 4: Optimization Notes

*What should improve?*

### Examples:

- Better signage needed
- Staff not mentioning partner offer consistently
- Guests respond well to reserve tasting upgrade
- Add QR code for easier booking
- Partner needs updated materials
- Weekend traffic strongest
- Follow-up email sequence improved conversions

## Part 5: Evaluation Column

### *Simple Performance Decision*

#### **KEEP**

*Consistent but stable*

Use when:

- Partnership performs reliably
- Moderate revenue contribution
- Low operational effort

**Focus: Maintain consistency and communication.**

#### **GROW**

*High-performing partnership*

Use when:

- Strong referral volume
- High conversion rates
- Excellent customer alignment

**Focus: Invest more**

- Co-marketing
- VIP programs
- Exclusive experiences
- Expanded incentives

#### **REWORK**

*Potential exists, but structure is weak*

Use when:

- Referrals are inconsistent
- Audience mismatch exists
- Communication gaps appear
- Conversion is poor

**Focus: Adjust strategy before abandoning.**

## Part 6: Monthly Review Questions

### Simple Leadership Check-In

1. Which partnerships drove the most revenue?
2. Which partnerships drove the highest-quality customers?
3. Which partnerships require operational improvements?
4. Which partnerships should be expanded next quarter?
5. Which partnerships should be paused or restructured?

## Part 7: KPI Benchmarks

### *Suggested Metrics to Watch*

#### Traffic Metrics

- Referral volume
- Reservation growth
- Partner-driven traffic

#### Conversion Metrics

- Visitor-to-purchase rate
- Visitor-to-club conversion rate
- Average order value

#### Revenue Metrics

- Revenue per partner
- Revenue per referred guest
- Lifetime value of referred customers

#### Relationship Metrics

- Partner responsiveness
- Ease of collaboration
- Referral consistency

## OPTIONAL ADVANCED TRACKING

### *For More Mature Programs*

#### Track Separately:

- First-time visitors vs repeat guests
- Corporate gifting repeat clients
- Seasonal performance patterns
- Highest-performing referral offers
- Most profitable partner category

## Why This Works

*Without tracking, partnerships stay emotional and anecdotal.*

### **This scorecard:**

- Creates visibility
- Helps prioritize effort
- Reveals where revenue actually comes from
- Identifies operational friction
- Makes scaling easier and smarter

Most importantly: It helps wineries stop treating partnerships like “nice extras” and start managing them like real business channels.

## Final Takeaway

***The best partnerships are not the ones that sound exciting.***

### **They're the ones that consistently drive:**

- **The right guests**
- **The right revenue**
- **The right long-term relationships**