



# Personalization Checklist

## For Wine Clubs

Practical ways to make every member feel known, valued, and connected.

## 1. Member Profile Essentials

**Ensure your CRM or club system captures and maintains accurate, actionable data:**

- Preferred wines (varietals, sweetness levels, red/white preferences)
- Club tier + membership start date
- Tasting room visit history
- Birthdays, anniversaries, and key personal dates
- Shipping preferences + seasonal shipping notes
- Allergies or dietary preferences (for events)
- Communication preferences (SMS, email, phone)

## 2. Onboarding Personalization

**Make new members feel welcomed from day one:**

- Personalized welcome email or video message
- Handwritten welcome note or card in the first shipment
- “What to expect in your first 90 days” onboarding guide
- A staff prompt to greet new members by name on their next visit
- A small welcome perk (bonus tasting, extra pour, digital gift)

## 3. Ongoing Engagement Personalization

**Create consistent moments of recognition throughout the year:**

- Automated birthday greetings with an optional offer
- Anniversary-of-membership message celebrating their loyalty
- Personalized recommendations based on past purchases
- Early access invitations based on engagement (e.g., high-LTV members)
- Tailored event invitations aligned with interest patterns
- Smart segmentation for relevant content (e.g., “Pinot lovers,” “Cab collectors”)

## 4. Shipment Personalization

**Even curated clubs can feel personal with the right touches:**

- Pre-shipment email explaining why selections were chosen*
- Optional “swap” opportunities or recommendations*
- Insert cards acknowledging the member’s tier or tenure*
- Short winemaker notes geared toward each member segment*
- Surprise-and-delight add-ins for long-time members*

## 5. Tasting Room & Hospitality Personalization

**Train your team to create personal recognition moments:**

- Staff sees club status instantly upon check-in
- Greet members by name whenever possible
- Acknowledge their club tier and benefits naturally
- Flag recent purchases to make conversation easier
- Offer a tailored pour based on their preferences
- Provide a quick thank-you for their loyalty

## 6. Data Hygiene & System Health

**Your personalization is only as strong as the data behind it:**

- Quarterly profile review for missing or outdated info
- Automated cleanup of bounced or invalid emails
- Consistent tagging and segmentation rules
- Integration checks to ensure tasting room data feeds into CRM
- Staff prompts updated regularly for accurate on-site engagement