ORDERPORT

Personalization Checklist

For Wine Clubs

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

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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

7. 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❏ Quarterly profile review for missing or outdated info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

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