



# 60 Day Action Plan

## Future-Proofing Your DTC Program

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A 60-day execution blueprint to help your winery move from ideas to action - focusing on the few changes that drive meaningful, measurable growth.

## Introduction: Future-Proofing Your DTC Program

Purpose: Turn Summit ideas into real progress within the next 60 days. Big ideas are powerful, but progress happens when teams commit to a small number of focused actions.

This worksheet helps you choose four high-impact improvements and turn them into a clear, trackable 60-day plan.

By the end of this exercise, your team will commit to:

- 1 metric to track consistently
- 1 club or loyalty experiment to test
- 1 system or process improvement
- 1 team training initiative

Small changes, executed consistently, create lasting momentum.

## Step 1 - Choose Your Focus Areas

### 1) The Metric We Will Track Consistently

Prompt: Which metric will give us the clearest signal that our DTC program is improving?

Examples:

- Repeat purchase rate
- Club retention or churn
- Visit → purchase conversion
- Purchase → club conversion
- Revenue per customer
- Reactivation rate

**Our chosen metric:** \_\_\_\_\_

**Why this metric matters:** \_\_\_\_\_

**Current baseline (if known):** \_\_\_\_\_

**Target after 60 days:** \_\_\_\_\_

**Who owns this metric?** \_\_\_\_\_

### 2) Club / Loyalty Experiment We Will Test

Prompt: What is one change we can test to improve engagement or retention?

Examples:

- Add shipment customization window
- Introduce post-shipment engagement emails
- Launch a member-only offer or event
- Improve onboarding communications

**Experiment description:** \_\_\_\_\_

**What problem are we trying to solve?** \_\_\_\_\_

**What success looks like:** \_\_\_\_\_

**Who owns this metric?** \_\_\_\_\_

### 3) System or Process Improvement

Prompt: Where is manual work, confusion, or friction slowing us down?

Examples:

- Improve reporting visibility
- Document workflows
- Improve inventory visibility
- Align POS / ecommerce / club processes
- Standardize shipment communications

**Improvement we will focus on:** \_\_\_\_\_

**Why this matters:** \_\_\_\_\_

**Success signal:** \_\_\_\_\_

**Who owns this metric?** \_\_\_\_\_

### 4) Team Training Initiative

Prompt: What capability will make the biggest difference for our team?

Examples:

- Wine club sales training
- Hospitality & guest experience coaching
- CRM usage training
- Leadership or manager development
- Onboarding improvements

**Training focus:** \_\_\_\_\_

**Who will participate:** \_\_\_\_\_

**Desired outcome:** \_\_\_\_\_

**Who owns this metric?** \_\_\_\_\_

## Step 2 — 60-Day Milestone Tracker

### Month 1 — Setup & Launch

Week	Focus	Key Actions	Owner	Status
Week 1	Kickoff	Align team + confirm priorities		
Week 2	Build	Prepare workflows, materials, tracking		
Week 3	Launch	Begin experiment / training / tracking		
Week 4	Review	Early results + adjustments		

## Month 2 — Optimize & Evaluate

Week	Focus	Key Actions	Owner	Status
Week 5	Continue	Maintain consistency		
Week 6	Measure	Review metric trends		
Week 7	Refine	Adjust based on learnings		
Week 8	Evaluate	Assess outcomes + next steps		

## Step 3 — Accountability Checkpoints

### Schedule these meetings now.

30-Day Check-In Date: \_\_\_\_\_

60-Day Review Date: \_\_\_\_\_

Who will lead check-ins? \_\_\_\_\_

### 30-Day Reflection Prompts

- What is working better than expected?
- What is harder than expected?
- What needs to change now vs later?
- Is the team aligned and engaged?

### Notes:

### 60-Day Review Prompts

- Did our chosen metric improve?
- What did we learn from our experiment?
- What process improvement had the biggest impact?
- How did training affect team confidence or results?
- What should we continue, expand, or stop?

### Notes:

## Final Commitment Page

In the next 60 days, we will:

Improve: \_\_\_\_\_

Test: \_\_\_\_\_

Strengthen: \_\_\_\_\_

Invest in our team by: \_\_\_\_\_

Next priority after 60 days: \_\_\_\_\_