



The Modern DTC Winery Scorecard

Self-Assessment Workbook + Scoring Tool

Evaluate your readiness for the
next era of DTC wine.

Introduction: Successful Clubs are Evolving — Are We Ready?

The DTC landscape is changing quickly. What worked ten years ago — even two years ago — may no longer be enough to sustain growth.

The Modern DTC Winery Scorecard helps leadership teams step back from day-to-day operations and evaluate the systems, metrics, and practices that support long-term success.

This workbook is designed to help you:

- Identify strengths and blind spots
- Align leadership around priorities
- Turn strategy into a 90-day action plan
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How to use this workbook

- Complete the self-assessment individually or as a leadership team.
- Score your readiness across five critical areas.
- Identify gaps and prioritize improvements.
- Build your 90-day action plan.

Section 1 — Rate Your Readiness

Scoring Matrix

Instructions:

Rate each statement from 1–5

1 = Not in place

2 = Early / inconsistent

3 = Functional but needs improvement

4 = Strong and consistent

5 = Fully optimized

Category 1 — Market Resilience & KPIs

Statement, Score (1-5)

- We track repeat purchase rate monthly ___
- We track wine club retention and churn consistently ___
- We understand our average customer lifetime value ___
- Leadership reviews DTC performance monthly ___
- We measure success beyond revenue (efficiency, retention, LTV) ___
- We can quickly identify trends in customer behavior ___

Category Score: ___ / 30

Category 2 — Loyalty & Club Design

- Our club offers flexibility or customization ___
- Our club onboarding journey is clearly defined ___
- We communicate with members between shipments ___
- We offer experiences or benefits beyond shipments ___
- We track reasons for cancellations ___
- We actively test improvements to reduce churn ___

Category Score: ___ / 30

Category 3 — Data & Reporting Maturity

- Our customer data is centralized ___
- We can see purchase + club + engagement data together ___
- We have a dashboard our team actually uses ___
- We segment customers for targeted outreach ___
- Our reports guide decisions, not just reporting ___
- We know which channels drive the best customers ___

Category Score: ___ / 30

Category 4 — Systems & Operational Alignment

- POS, ecommerce, and club systems are connected ___
- Inventory is accurate across all sales channels ___
- Reporting is consistent across departments ___
- Team workflows are documented and repeatable ___
- We rely on systems rather than manual workarounds ___
- Operational issues are resolved proactively ___

Category Score: ___ / 30

Category 5 — Training & Team Development

- Staff receive ongoing sales and hospitality training ___
- New hires have a structured onboarding process ___
- Team performance is measured and coached ___
- Staff understand the value of wine club membership ___
- We invest in leadership and management development ___
- Training is treated as a growth strategy ___

Category Score: ___ / 30

TOTAL SCORE

Add all category scores:

Total Score: ___ / 150

Readiness Levels

- 120–150, Leading & Future-Ready
- 90–119, Strong Foundation
- 60–89, Developing
- Below 60, High Opportunity

Section 2 — KPI Tracker Template

Monthly KPI Dashboard (Google Sheet Tab)

Columns:

- Month
- Repeat Purchase Rate %
- Club Retention %
- Club Churn %
- Customer Lifetime Value
- Visit → Purchase %
- Purchase → Club %
- Revenue per Customer

Prompts:

Which metrics improved?

Which declined?

What likely influenced the change?

What action will we test next month?

Section 3 — Gap Analysis Worksheet

Step 1: Identify Lowest Scoring Category

Lowest Score: _____

Step 2: Identify Key Gaps

Area	What's Missing?	Why It Matters	Impact
Example: Club onboarding	No structured welcome journey	Weak early engagement	High churn

Step 3: Identify Root Causes

Prompts:

- Is this a people issue?
- A process issue?
- A system limitation?
- A training gap?

Section 4 — 90-Day Priority Planner

Choose 1-2 priorities per category

Priority 1

Area:

Goal:

Owner:

Success Metric:

Deadline:

Priority 2

Area:

Goal:

Owner:

Success Metric:

Deadline:

Monthly Milestones

Month	Focus	Key Actions	Success Signal
Month 1			
Month 2			
Month 3			

Final Reflection

In 90 days, we will have:

Improved: _____

Tested: _____

Learned: _____

Planned next: _____

Closing Page Copy

The wineries that thrive in the next era of DTC wine will not be the busiest, they will be the most aligned. Small, consistent improvements — guided by the right metrics and systems — create lasting growth.