

VANTAGE *by* ORDERPORT

# Harvest to Hospitality



IMPROVING GUEST ENGAGEMENT & SERVICE  
CULTURE THROUGH DATA-DRIVEN TRAINING

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# What to Expect

THE MODERN GUEST JOURNEY

WHAT YOUR DATA IS REALLY TELLING YOU

TURNING CRM INTO A FRONT-LINE TOOL

COACHING TEAMS WITH REAL GUEST DATA

WHAT HIGH-PERFORMING WINERIES DO DIFFERENTLY

THE QUIET RISK OF INCONSISTENT HOSPITALITY





Most wineries do not struggle with hospitality; they struggle with consistency.



# The Data Reality Check



## Most teams can answer:

What sold yesterday  
Revenue by channel  
Which SKUs are performing

## Far fewer can answer:

Who visited last weekend and why  
What experiences drive club conversion  
Which guests are likely to return  
What makes visitors feel remembered

# The Data Wineries Often Aren't Collecting

Visit & Experience Data

**First visit vs repeat visit tracking**

Visit frequency and recency

Experience type booked

**Staff interaction history**

**Wine preferences and taste profile**

**Purchase price comfort range**

**Event attendance patterns**

Gifting behavior

Local vs destination guest

Engagement Signals

Email engagement tied to visits

Post-visit purchase behavior

Club consideration signals

# The Modern Guest Journey

Discovery

Booking

Arrival

Tasting

Follow Up

Loyalty

Experience begins before the arrival and continues after the visit!

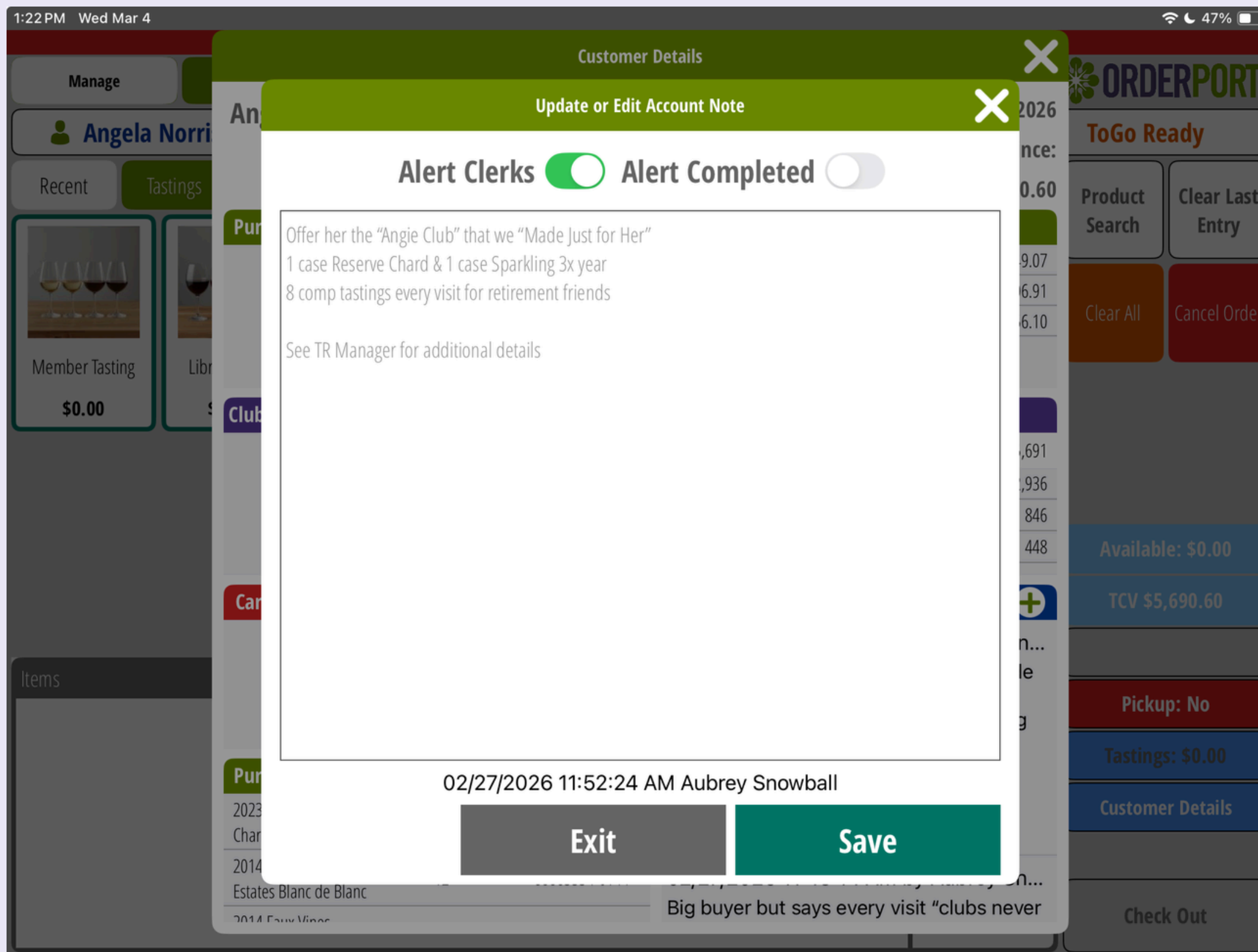
# What is Your Data Really Telling You?

## Key Signals

- Visit frequency
- Purchase behavior
- Club movement
- Engagement trends

## “Moments that Matter”

- First visit or shipment
- First missed shipment
- Birthdays
- Milestone purchases
- Interactive Exercise



If this person walks in today, what should your team do differently?



# Service Culture as a System

Hiring better  
people is not  
a strategy.



What guest moment changes depending on who is working?

# Turning CRM Into a Front-Line Tool

**What staff  
actually  
need:**

- Customer Notes
- Club status
- VIP / high-value indicator
- Experience history
- Preferences snapshot

# Coaching Teams With Real Guest Data

Move metrics to mentorship!



What does “great performance” look like today?

What wows you in a tasting experience?

What encourages you to go back to a winery you recently visited?

# Loyalty is Not Transactional

- 1 First Purchase is a Moment**
- 2 Second Purchase is a Decision**
- 3 Third Purchase is Loyalty**

# Emotional Drivers

**Recognition**



**Memory**



**Belonging**



**What makes a guest feel like an insider?**

# What High-Performing Wineries do Differently



Daily pre-shift data huddles

Guest profile reviews before bookings

CRM-driven follow-ups

Dashboards tracking experience, not just revenue

2-way communication BOH and FOH

# The Quiet Risk of Inconsistent Hospitality



Inconsistent experiences erode trust and trust is the currency of wine clubs and long-term DTC growth.

**Why This Matters: Guests judge the brand by their last visit**

# The Hidden Cost



Inconsistent hospitality rarely shows up as complaints.

**It shows up as silence**

# The Business Impact



## **Directly affects:**

- Club conversion
- Club retention
- Return visit frequency
- Average order value
- Word-of-mouth growth

**Result: Unpredictable revenue and harder marketing.**

# Key Takeaway



**Consistency does not make hospitality robotic,  
it makes great experiences repeatable**

Memorable → Loyalty

Consistent → Trust

Trust → Long-term revenue

# Practical Takeaways

- 1 One service moment to standardize**
- 2 One CRM field to activate**
- 3 One coaching metric to introduce**
- 4 One follow-up workflow to launch**

# Final Message

Data does not replace hospitality,  
it protects it by making great  
experiences repeatable.

April Growth  
Session



April Industry  
Summit



Demo  
with Us!





# Q&A

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Thank You! 

JOIN OUR NEXT VANTAGE SESSION!