

VANTAGE *by* **ORDERPORT**

Love Your Club



TURNING MEMBERS INTO LIFELONG ADVOCATES

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What to Expect

RETENTION REALITY CHECK

MODERN CLUB MEMBER MINDSET

THREE PILLARS OF CLUB RETENTION

ACTION PLAN



The Retention Reality Check



The Shift

Membership as a transaction →
membership as a relationship

Acquisition

Experience

Relationship

Advocacy

Top Performers Sustain Conversion at Scale - Turning Higher Traffic into Net Growth

(Jan. 1 - Dec. 31st 2025)

	Top 20%		All Other	
Visitors	19,250	+2%	9,710	-9%
Club Visitors %	44%	+2%	37%	+2%
Club Conversion Rate	3.5%	-8%	3.5%	-5%
Member Acquisition Rate	23%	-8%	19%	-5%
Member Attrition Rate	27%	+18%	26%	+11%
% Total DTC Sales To New (Non-Club) Buyers	41%	+2%	38%	-1%

Top Performers Grow Total Club Sales Thru Engagement Indicators

(Jan. 1 - Dec. 31st 2025)

	Top 20%		All Other	
Allocation Value (Club AOV)	\$262	+10%	\$288	-1%
Beyond Allocation Sales	\$841k	+10%	\$547k	-8%
Club Visitors %	44%	+2%	37%	+2%

OP PARTNER

 **CommunityBenchmark**™

Why are people joining clubs today?

Access

LIMITED WINES, MEMBER-ONLY PERKS, EARLY RELEASES

Flexibility

SKIP, SWAP, PAUSE, OR CUSTOMIZE WITHOUT FRICTION

Connection

FEELING KNOWN BY THE BRAND, NOT MARKETED TO

Convivence

WINE SHOWS UP WITHOUT THINKING ABOUT IT

Value (not discounts)

EXPERIENCES, STORIES, AND BELONGING

They're not joining for a case of wine. They're joining for how it fits into their life.

**What
Is Not
Working**

**Rigid Shipments
“Set it and forget it”
Discount Loyalty**

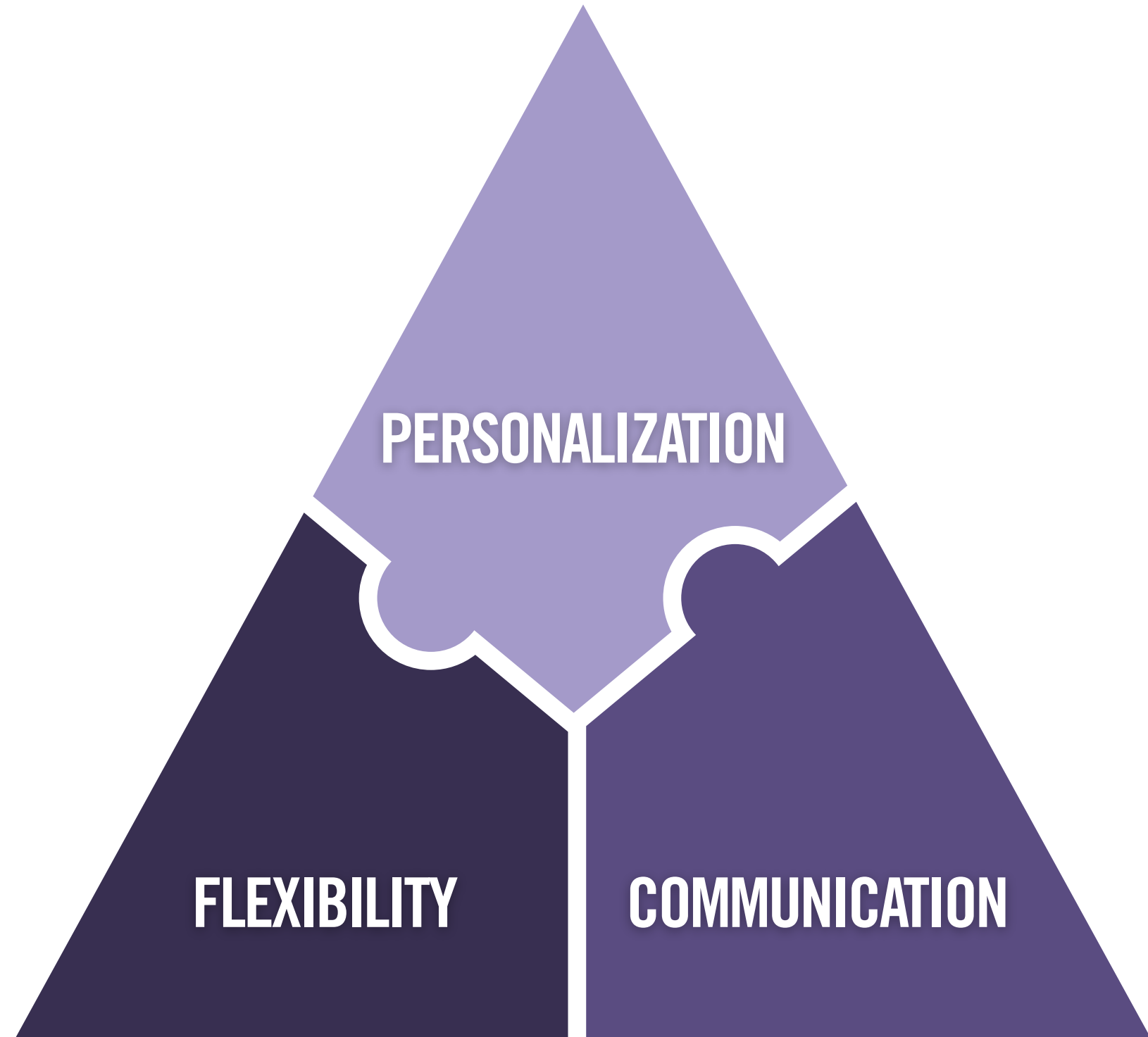




**Loyalty doesn't fail because
wineries don't care – It fails because systems
can't support relationships at scale.**



The Loyalty Triangle





Pillar One: Flexibility Without Chaos



Top Churn Triggers

- Unexpected charges
- Confusing shipment timing
- No way to skip, swap, or delay



Models that Work

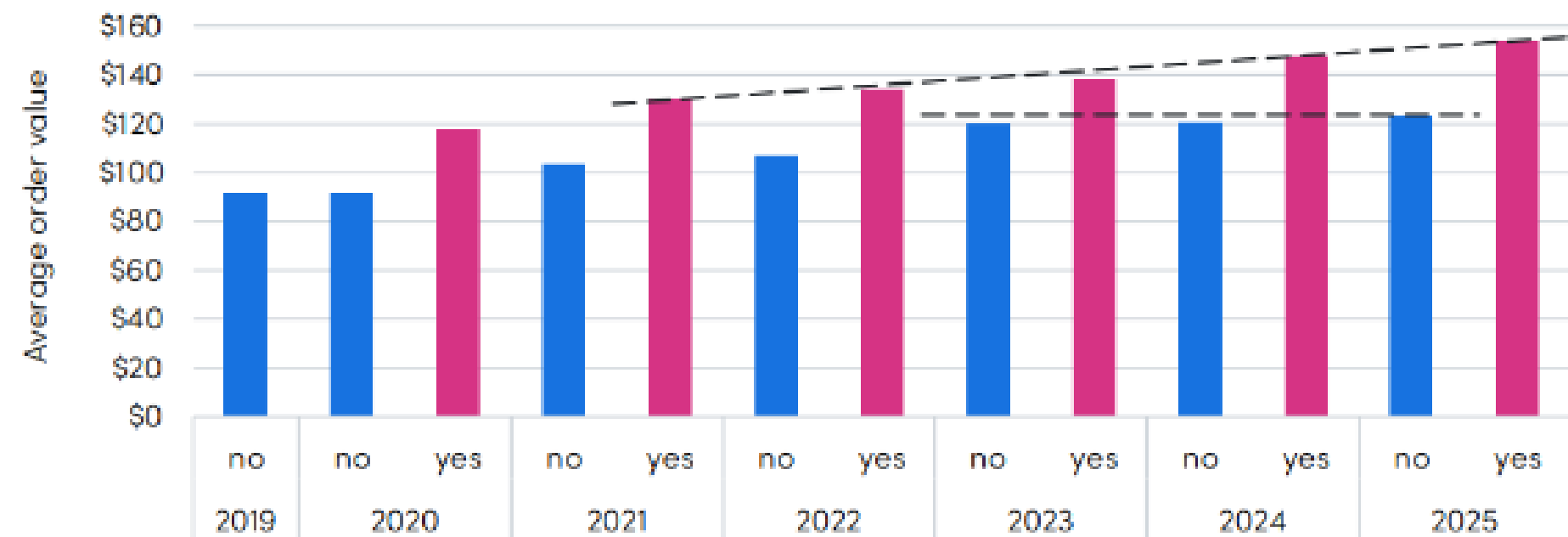
- Guided customization windows
- Controlled skip rules
- Payment retry logic
- Stored cards with transparency
- Different models for different consumers



Finding the Right Balance

Framework: Winemaker Control vs. Member Flexibility

- Too much control → Members feel stuck → Churn
- Too much freedom → Hard to manage → Operational headaches
- Balanced middle → Predictable operations + long-term loyalty



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Flexibility That Works

	Decreased significantly	Decreased	Flat	Increased	Increased significantly
Exclusive products	-	14.3%	28.6%	50.0%	7.1%
Flexible shipment options	3.6%	25.0%	42.9%	21.4%	7.1%
Member-only experiences	4.1%	21.9%	28.8%	34.3%	11.0%
Price discounts	6.9%	16.4%	33.6%	36.2%	6.9%
Shipping included	5.0%	25.0%	40.0%	25.0%	5.0%
Other	5.0%	20.0%	42.5%	22.5%	10.0%

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Pillar Two: Communication That Builds Trust



The 3-Touch Shipment Model:

- 1 Preview Email**
What's coming and why it matters
- 2 Billing Reminder**
Clear, friendly, no surprises
- 3 Delivery Follow-Up**
Education, pairing, and story



More Than a Transaction

Vineyard stories

Winemaker notes

Member-exclusive access moments

Loyalty progress updates

Check the Data

Open Rates - Click Rates - Skip Rates

Churn Timing Correlation

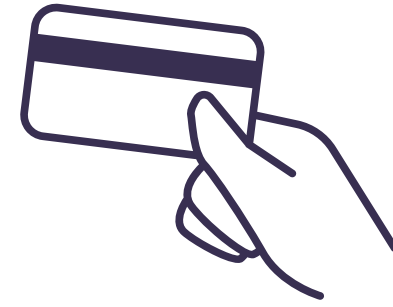


Pillar 3: Personalization at Scale

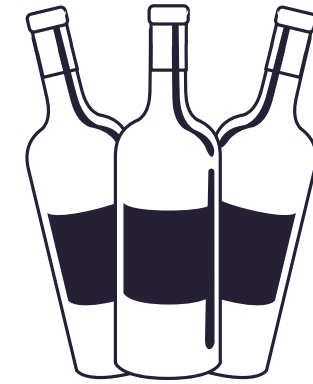


Behavioral Segmentation

TARGET > BLANKET



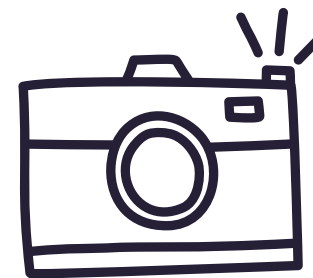
Buyers



Collectors



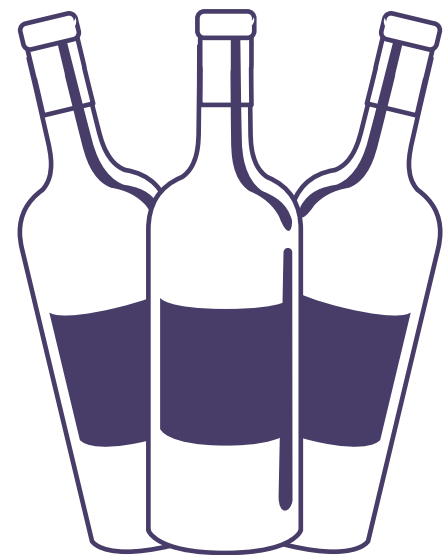
Gifters



**Experience
Seekers**

Let Your Data Decide!

**Wine
Selection**



**Messaging
Tone**



**Release
Timing**



**Offers &
Specials**



Examples

**Tier-Based Benefits vs.
Behavior-Based Benefits**

**Curated Shipments vs.
Guided Choice Models**

Recognition Moments:
Anniversaries, Milestones,
Loyalty Thresholds





From Members to Advocates

ELEVATE THE ENDGAME BEYOND RETENTION



Signs of Advocacy

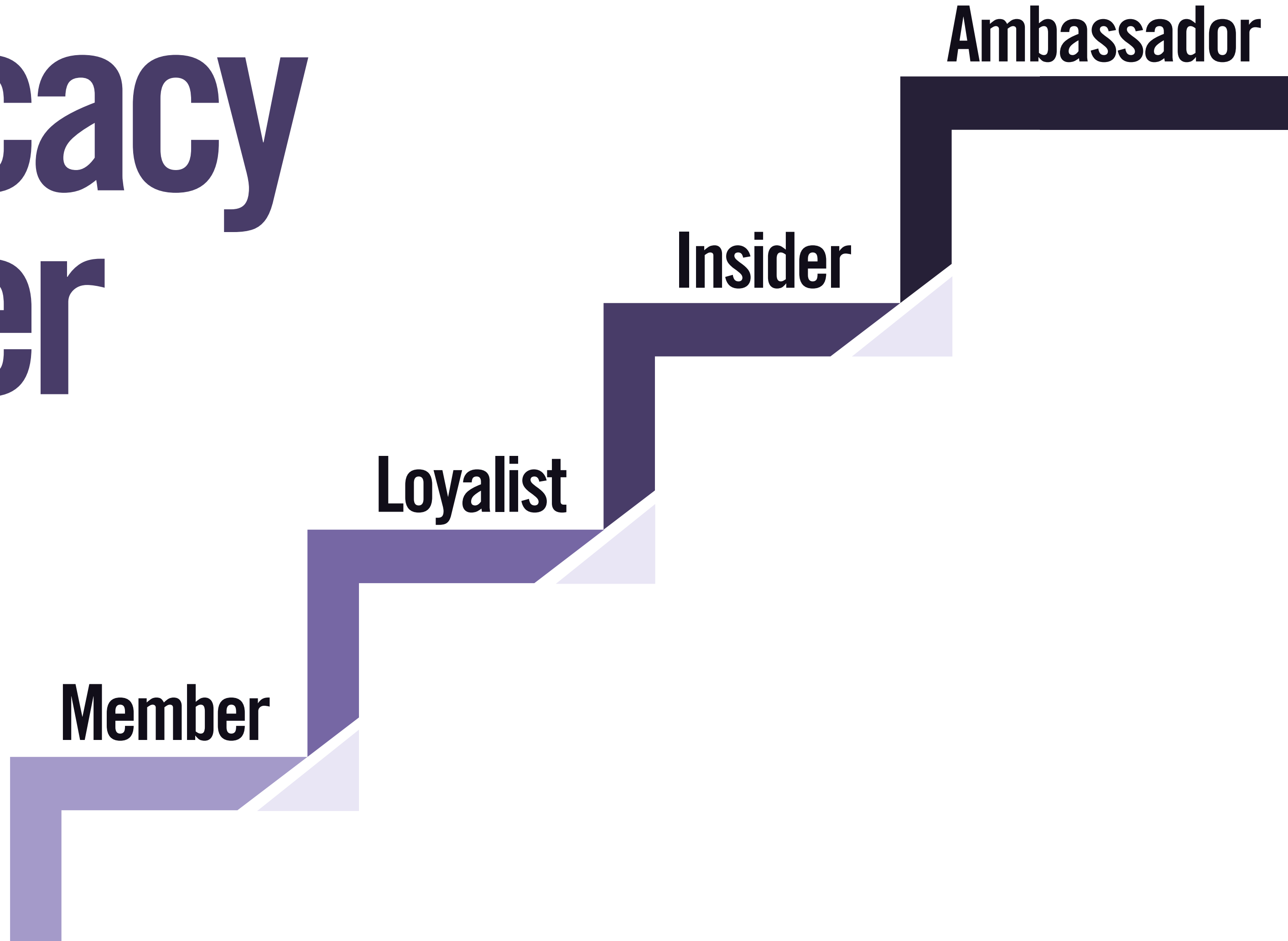
- Referrals
- UGC & Social Sharing
- Event Attendance
- Upsell Behavior



Inside the Brand Moments

- Early Access
- Founder's Circles
- Private Virtual Tastings
- Loyalty Milestones

Advocacy Ladder



Action Plan: 30-day Loyalty Reset



- Audit churn reasons from last 12 months
- Segment members into 3 behavioral groups
- Map your billing and communication calendar
- Identify one personalization win to launch this quarter

How OrderPort Can Help

Segmentation

6 Club Models

Automated Billing

Custom Communication

Loyalty Tracking

OP Customer
Master Class
Sign Up



Industry
Summit



Demo
with Us!





Q&A

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Thank You!



JOIN OUR NEXT VANTAGE SESSION - FEB. 19TH!