



# Wine Club Audit Checklist

## Evaluate Your Current Offerings & Uncover Opportunities for Growth

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Use this quick-hit audit to assess your current wine club model and identify key areas for improvement—whether you're just getting started or ready to take your club to the next level.



## Wine Club Audit Checklist

### 1. Member Onboarding

- Welcome email or onboarding series in place
- Personalized thank-you or intro call from staff
- “Welcome Packet” or digital guide provided
- Clear communication of next steps post sign-up

### 2. Club Structure & Value

- Multiple tiers or flexible shipment options
- Benefits clearly communicated (discounts, exclusives, etc.)
- Competitive pricing and structure
- Club shipments are customizable

### 3. Conversion Tactics

- Tasting room team trained to promote the club
- Signage and marketing materials visible onsite
- Seasonal incentives or time-sensitive promos used
- Visitor emails captured for follow-up

### 4. Communication & Engagement

- Personalized emails based on behavior/preferences
- Birthday or milestone outreach
- Club-exclusive events or behind-the-scenes access
- Social media content tailored to members



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### 5. Churn Prevention & Retention

- “Pause” or “Skip Shipment” options available
  - Exit survey sent to canceling members
  - Follow-ups with at-risk members (e.g., skipped customization)
  - Re-engagement campaigns in place for lapsed members
- Wine Club Audit Checklist

### 6. Technology & Reporting

- Integrated POS, ecommerce, and wine club tools
- Mobile-friendly sign-up & member portals
- Easy self-serve updates & customization
- Regular review of KPIs: AOV, churn, growth, LTV

## Scoring

### ***For each section, rate yourself:***

4 = Best-in-Class

3 = Solid

2 = Needs Work

1 = Not Yet in Place

- Identify your top 2–3 opportunities for growth
- Assign owners and target completion dates
- Revisit this checklist quarterly to measure improvement

**Want help optimizing your wine club experience?  
Contact our team for a personalized consultation.**