



# Wine Club Evolution Playbook

## From Shipments to Relationships

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A practical guide for winery owners, DTC leaders, and club managers to help modernize their club program to improve retention, engagement, and long-term customer value.

## Introduction: Successful Clubs are Evolving — Are We Ready?

Wine clubs built the foundation of modern DTC wine, but the expectations of today's wine consumers — especially newer and younger audiences — are changing.

- Automatic shipments → flexible experiences
- Discounts → belonging
- Transactions → relationships

This playbook helps you evaluate your current model and test practical improvements you can implement within the next 90 days.

## Section 1: Modern Club Model Menu

How to use: Most wineries will use a blend of these models.

The goal isn't to replace your club overnight, it's to identify where evolution can begin.

### → Model 1 - Traditional Allocation Club

#### *Foundation Model*

#### Characteristics

- Fixed shipments (quarterly/semiannual)
- Pre-selected wines
- Discounts + perks
- High predictability for winery

#### Strengths

- Forecastable revenue
- Operational simplicity
- Familiar to long-time members

#### Common Risks

- Perceived lack of flexibility
- Shipment fatigue
- Higher churn during economic pressure

#### Quick Wins to Test

- Add limited customization window
- Introduce digital engagement between shipments
- Add experiential perks beyond discounts

## → Model 2 — Flexible Club

### *Customization & Choice*

#### **Characteristics**

- Skip, swap, or customize shipments
- Multiple tiers or shipment frequencies
- Communication focused on member control

#### **Strengths**

- Reduced churn risk
- Appeals to modern subscription mindset
- Higher perceived value
- Operational Considerations
- Requires strong communication workflows
- Requires clear shipment reminders and deadlines

#### **Quick Wins to Test**

- Add skip/shipment hold option
- Introduce customizable shipment emails
- Offer pickup vs shipping flexibility

## → Model 3 — Access Club

### *Belonging & Insider Access*

#### **Characteristics**

- Priority access to wines and experiences
- Early releases and limited offers
- Event invitations and exclusive content

#### **Strengths**

- Emotional loyalty driver
- Works well for premium tiers
- Differentiates beyond price and discounts

#### **Quick Wins to Test**

- Member-only release windows
- Private virtual tastings
- Behind-the-scenes content

## → Model 4 — Experience-Driven Club

### *Community & Identity*

#### **Characteristics**

- Events, hospitality, and connection at the core
- Experiences drive membership value
- Club becomes lifestyle/community

#### **Examples**

- Member weekends
- Private tastings and dinners
- Travel experiences or harvest access

#### **Why this model is growing: Modern consumers value:**

- Experiences > products
- Belonging > discounts
- Stories > scores

## **Section 2: Wine Club Churn Risk Checklist**

Use this checklist quarterly.

*Mark any that apply:*

#### **Communication Risks**

- Members only hear from us at shipment time
- Shipment reminders are unclear or rushed
- No onboarding or welcome journey
- Emails focus on transactions, not stories

#### **Data Risks**

- No tracking of cancellation reasons
- No segmentation of members
- No re-engagement for lapsed members

#### **Experience Risks**

- Benefits are unclear or outdated
- Few experiences beyond discounts
- No engagement between shipments
- No recognition of anniversaries or milestones

#### **Flexibility Risks**

- No skip or customization options
- Difficult cancellation process
- Members surprised by billing/shipping

**If you checked 5+ items: Retention risk is likely higher than industry benchmarks.**

### SECTION 3: Club Onboarding Journey Map Template

Goal: Design the first 30 days of membership intentionally. Use visit data + purchase behavior to identify high-potential customers.

Stage	Timing	Message	Goal
Welcome	Immediately	Thank you + confirmation	Reinforce decision
Brand Story	Week 1	Founder/winery story	Build emotional connection
Education	Week 2	How club works	Reduce confusion
Engagement	Week 3	Event/content invite	Encourage participation
First Shipment	Week 4	Shipment preview	Build anticipation

**How can we make new members feel known and valued within 30 days?**

### Section 4 — Retention Moment Planner

Retention happens in moments, not at cancellation.

#### Moment 1 — First Shipment

*Goal: Reinforce excitement and validate the decision.*

Checklist:

- Personalized shipment email
- Winemaker or tasting notes video
- Food pairing or hosting tips
- Invitation to share experience online

#### Moment 2 — 90 Days

*Goal: Prevent early churn.*

Ideas:

- Member check-in email
- Invite to event or virtual tasting
- Member spotlight or community story
- Special offer or early access

### **Moment 3 — One Year Anniversary**

*Goal: Celebrate loyalty and deepen connection.*

Ideas:

- Anniversary thank-you gift
- Exclusive wine offer
- Personal note or video message
- Invite to member-only event

### **Club Engagement Workflow:**

**Shipment Email → Engagement Email → Experience Invite**

#### **→ Step 1 — Shipment Email**

*Timing: 2-3 weeks before billing*

Goal: Transparency + excitement

Includes:

- Shipment preview
- Customization options
- Reminder of member benefits

#### **→ Step 2 — Engagement Email**

*Timing: 2-3 weeks after shipment*

Goal: Keep momentum

Ideas:

- Tasting notes & pairings
- Winemaker story
- “How did you enjoy your wines?” survey

#### **→ Step 3 — Experience Invite**

*Timing: 4-6 weeks after shipment*

Goal: Reinforce belonging

Examples:

- Event invite
- Virtual tasting
- Early access to release

### **Conclusion:**

The wineries with the healthiest clubs in the next decade will not have the biggest clubs. They will have the most engaged ones. Small changes to communication, flexibility, and experiences can dramatically improve retention and transform your club from a shipment program into a community.