



# Wine Sale Planning Guide

A month-by-month revenue, retention & engagement strategy for wineries

## JANUARY: Reset, Re-Engage, Replenish

**Focus:** Inventory clearance, member re-engagement

**Consumer Behavior:** Post-holiday fatigue, but high intent for “fresh start” buying, value-seeking

**Primary Goal:** Clear slow movers & re-engage club members after holiday lapse

**Strategies:**

- Exclusive member-only pricing on past vintages
- “New Year, New Wines” tasting flight promotions
- Launch a loyalty refresh: double points, check-in rewards
- Re-engage lapsed club members with win-back offers

**Suggested Offers:**

- Case deals on prior-year vintages
- Mystery packs / winemaker curated boxes
- TR-only clearance shelf

**Marketing Channels:** Email win-back flows | Social countdown campaigns | SMS stock alerts

**OrderPort Opportunities:**

- Use Club Segments to target at-risk members
- Set up Inventory Alerts for clearance SKUs

**KPIs:** Inventory sell-through %, club reactivation rate, email CTR

## FEBRUARY: Romance, Pairings & Gifting

**Focus:** Valentine’s Day promotions

**Consumer Behavior:** Heavy gift-buying, experiential interest (dinners, tastings)

**Primary Goal:** Drive gift sales & bundled AOV increases

**Strategies:**

- “Perfect Pairing” wine + chocolate/cheese bundles
- Limited-time duo sets (sparkling + rosé, cab + dessert wine)
- Date-night tasting events

**Suggested Offers:**

- Customizable two- and three-bottle gift sets
- Pre-order dinner bundles with recipe cards

**Marketing Channels:** Paid social | Gift guides | Influencer pairing reels

**OrderPort Opportunities:**

- Enable Custom Bundles
- Add Gift Message Automation

**KPIs:** AOV, gift bundle conversion, tasting event attendance

## MARCH: Tax Refund Season + Club Renewal Momentum

**Focus:** Refund season begins, wine club renewals

**Consumer Behavior:** Higher discretionary spending

**Primary Goal:** Lock in renewals early

**Strategies:**

- Early renewal benefits (bonus bottle, upgrade incentive)
- Introduce new spring vintages to generate excitement

**Suggested Offers:**

- “Tax Refund Treat Yourself” packages
- Club tier upgrade incentives

**Marketing Channels:** Email + SMS reminders | Renewal deadline countdown | Blog: “How to choose the right tier”

**OrderPort Opportunities:**

- Enable Auto-Renew + Flexible Billing Windows
- Segment club members by renewal date

**KPIs:** Renewal rate, upgrade %

## APRIL: Spring Releases & Sustainability

**Focus:** Spring releases, Earth Day tie-ins

**Consumer Behavior:** High season for rosé, whites, and new releases

**Primary Goal:** Create early-season buzz & drive pre-orders

**Strategies:**

- Highlight sustainability practices for Earth Day
- Host spring release parties
- Offer limited-edition bundles

**Suggested Offers:**

- Spring allocation pre-orders
- Eco-friendly merch add-ons

**Marketing Channels:** Earth Day social campaign | PR & blog content on sustainability | Virtual tasting

**OrderPort Opportunities:**

- Add Pre-Order SKUs with release automation
- Use Product Badges (“New Release,” “Sustainable”)

**KPIs:** Pre-order volume, event attendance, new customer acquisition

## MAY: Mother's Day + Start of Summer

**Focus:** Mother's Day gifting, summer entertaining

**Consumer Behavior:** Mother's Day drives gifting + brunch occasions

**Primary Goal:** Maximize gifting and seasonal refresh purchases

**Strategies:**

- Mother's Day curated boxes
- Rosé and sparkling seasonal features
- Winery picnic kits

**Suggested Offers:**

- "Sip with Mom" two-bottle sets
- Rosé case discounts

**Marketing Channels:** Gift campaigns | SMS last-minute reminders | Seasonal Pinterest content

**OrderPort Opportunities:**

- Add Gift Bundles with Delivery Deadline Alerts

**KPIs:** Gift order volume, rosé sales, new gift buyer segments

## JUNE: Father's Day + Weddings + Event Season

**Focus:** Father's Day, weddings, events

**Consumer Behavior:** High-value purchases, gifting, and bulk needs

**Primary Goal:** Drive high-margin case sales

**Strategies:**

- Large-format bottle promos
- Case discount events
- Wedding-season bulk packages

**Suggested Offers:**

- Magnum specials
- BBQ pairing sets

**Marketing Channels:** Google search ads | Corporate gifting outreach | Event-based Instagram posts

**OrderPort Opportunities:**

- Create Event Packages with custom pricing
- Track Corporate Accounts in CRM

**KPIs:** Case sales, wedding/event inquiries

## JULY: 4th of July + Travel Season

**Focus:** Holiday gatherings, vacations

**Consumer Behavior:** Outdoor entertaining + travel retail

**Primary Goal:** Increase bulk purchases & drive tasting room traffic

**Strategies:**

- 4th of July specials
- “Summer road trip” bundles
- TR-only frozen wine cocktails (if applicable)

**Suggested Offers:**

- Buy 5 get 1 free
- Mixed case summer selections

**Marketing Channels:** Geo-targeted ads | Tourism partnerships | SMS flash sales

**OrderPort Opportunities:**

- Enable Pickup Scheduling to manage traffic
- Promote Digital Gift Cards for travelers

**KPIs:** TR foot traffic, bulk order volume

## AUGUST: Late Summer Push

**Focus:** Last-minute events, clearing seasonal SKUs

**Consumer Behavior:** High travel & leisure activity

**Primary Goal:** Clear inventory before harvest

**Strategies:**

- End-of-summer sale
- Tourism cross-promotions
- “Heatwave Wines” chilled promotions

**Suggested Offers:**

- Clearance bins
- Mixed chilled whites + rosé packs

**Marketing Channels:** Local tourism maps | Partnerships | Social countdowns

**OrderPort Opportunities:**

- Auto-tag tourism buyers for future retargeting

**KPIs:** Sell-through %, new visitor conversion

## SEPTEMBER: Back-to-Business Season

**Focus:** Corporate gifting, fall event planning

**Consumer Behavior:** Offices reopening, budgets set

**Primary Goal:** Book corporate orders & Q4 events early

**Strategies:**

- Launch corporate gifting program
- Offer customizable business packages
- Promote offsite tasting events

**Suggested Offers:**

- Corporate sampler kits
- Conference attendee gifts

**Marketing Channels:** LinkedIn | B2B outreach | Email sequences

**OrderPort Opportunities:**

- Create Corporate Contact Segments
- Build B2B price lists

**KPIs:** Corporate leads, B2B revenue

## OCTOBER: Harvest Season Storytelling

**Focus:** Harvest content, wine education

**Consumer Behavior:** High engagement with winery stories & behind-the-scenes

**Primary Goal:** Convert storytelling into club signups

**Strategies:**

- Virtual harvest tastings
- Harvest club release
- Behind-the-scenes content

**Suggested Offers:**

- Limited harvest packs
- Educational tasting flights

**Marketing Channels:** Instagram reels | Lives | Blog posts | Email storytelling series

**OrderPort Opportunities:**

- Tag new content-driven leads
- Offer One-Click Club Signup in email

**KPIs:** Engagement rate, club signups

## NOVEMBER: Corporate Gifting & Thanksgiving

**Focus:** Gifting season kickoff

**Consumer Behavior:** Early shoppers, bulk buyers, shipping-conscious consumers

**Primary Goal:** Capture early holiday spend

**Strategies:**

- Segment buyers by volume
- Ship-early incentive offers
- Thanksgiving pairing sets

**Suggested Offers:**

- Customizable gift sets
- Multi-case tiered discounts

**Marketing Channels:** Gift catalogs | Email tiered offers | SMS cutoff alerts

**OrderPort Opportunities:**

- Add Shipping Cutoff Banners
- Automate Gift Follow-Up Sequences

**KPIs:** Gifting revenue, early order %

## DECEMBER: The Big Finish

**Focus:** Holiday gifting, year-end wrap-up

**Consumer Behavior:** High urgency purchases, last-minute gifts

**Primary Goal:** Maximize final revenue and finalize club growth

**Strategies:**

- Tiered promotions (week-by-week)
- Countdown-to-shipping-deadline campaigns
- Gift card accelerators

**Suggested Offers:**

- Staff picks holiday pack
- Sparkling bundles
- Digital gift cards

**Marketing Channels:** SMS last-minute alerts | Social countdowns | TR gift stations

**OrderPort Opportunities:**

- Enable Digital Gift Cards + Instant Delivery
- Trigger Low Inventory Alerts systemwide

**KPIs:** Holiday revenue, conversion rate, TR gift sales