



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