



# Winery Holiday Operations Planner

Set the Stage for Success

The holidays bring both opportunity and pressure. With up to 35% of annual DTC revenue generated between November and December, readiness is everything. This checklist keeps your entire team aligned — from sales and marketing to fulfillment and customer support — ensuring every part of your operation runs seamlessly.

## 1. Sales & Inventory

- Readiness Review last year's Q4 data to forecast product demand.
- Identify bestsellers and bundle opportunities for gift sets.
- Verify all SKUs, inventory counts, and pricing in OrderPort.
- Confirm POS, ecommerce, and club sales data are synced.
- Stock adequate shipping supplies, packaging, and inserts.
- Communicate with fulfillment partners to confirm capacity.
- Establish internal deadlines for order cutoffs and shipping dates.

## 2. Marketing & Campaign Alignment

- Finalize campaign calendar (email, social, website).
- Approve creative assets and promotional copy.
- Schedule automated campaigns through OrderPort.
- Launch pre-holiday teaser for club members in early November.
- Promote key offers and referral programs mid-November.
- Align campaign messaging with fulfillment readiness.
- Monitor open/click rates and adjust based on performance.

## 3. Club Member Engagement

- Send renewal reminders at least 30 days in advance.
- Automate reactivation emails for paused members.
- Create "Gift-a-Club" holiday offers.
- Personalize messaging based on member type (active, lapsed, VIP).
- Review reward and loyalty programs for accuracy.
- Track renewals, referrals, and upgrades in OrderPort.

## 4. Customer Support & Service

- Update FAQs and holiday messaging across channels.
- Set up automated responses and ticket routing in OrderPort.
- Train seasonal staff on tone, empathy, and escalation paths.
- Publish holiday hours and contact information on all touchpoints.
- Communicate expected delivery timelines clearly.
- Create self-service resources for common issues.
- Monitor and respond to customer inquiries daily.

## 5. Staffing & Internal Coordination

- Hold a pre-holiday kickoff meeting to review goals and responsibilities.
- Crosstrain staff on POS, club, and fulfillment systems.
- Confirm backup plans for key roles during peak weeks.
- Create an internal Slack or group chat for real-time coordination.
- Recognize staff contributions and celebrate milestones to maintain morale.

## 6. Post-Holiday Wrap-Up & Analysis

- Conduct a debrief within two weeks after the holidays.
- Review performance metrics (AOV, order volume, support response times).
- Document lessons learned for next year's planning.
- Survey customers and club members for feedback.
- Replenish inventory and update marketing templates for January.
- Celebrate team achievements and share results company-wide.