

Winery Tech Readiness Checklist

Is your technology helping your business grow—or holding it back? Use this checklist to evaluate your current systems and uncover opportunities to modernize and streamline operations.

1. Systems Integration

- ☐ Ensure all core tools communicate seamlessly
- ☐ POS, wine club, ecommerce, and inventory are connected
- ☐ Customer data is centralized and easily accessible
- ☐ Sales channels sync in real-time (in-person, online, events)

2. Inventory & Order Management

- ☐ Keep every bottle accounted for—from barrel to fulfillment.
- ☐ Real-time inventory tracking across all locations
- ☐ Lot tracking from grape to bottle
- ☐ Automated aging alerts and reorder notifications
- ☐ Accurate order fulfillment with pick lists and label printing

3. Sales & Performance Visibility

- ☐ Make data-driven decisions with confidence
- ☐ Dashboards show top-selling wines and laggards
- ☐ Inventory and sales trends are visible at a glance
 - ☐ Custom reports are easy to generate and export
- ☐ Club performance and DTC sales metrics are trackable

4. Wine Club Experience

- ☐ Modernize your club to retain and delight members
- ☐ Flexible membership options (custom selections, skips, gift memberships)
- ☐ Automated billing and renewals
- ☐ Member preferences and purchase history easily accessible
- ☐ Personalized communication and upsell capabilities

5. Tasting Room & Payments

- ☐ Streamline the guest experience and speed up service
- ☐ Mobile POS works anywhere (bar, patio, vineyard)
- ☐ Staff can access customer and club info instantly
- ☐ Secure, seamless payments (card, ACH, BNPL, etc.)
- ☐ Easy refunds, order edits, and tip adjustments

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6. Compliance & Security

- ☐ Ensure all core tools communicate seamlessly
- ☐ POS, wine club, ecommerce, and inventory are connected
- ☐ Customer data is centralized and easily accessible
- ☐ Sales channels sync in real-time (in-person, online, events)

7. Team Efficiency

- ☐ Keep every bottle accounted for—from barrel to fulfillment.
- ☐ Real-time inventory tracking across all locations
- ☐ Lot tracking from grape to bottle
- ☐ Automated aging alerts and reorder notifications
- ☐ Accurate order fulfillment with pick lists and label printing

8. Scalability & Support

- ☐ Make data-driven decisions with confidence
- ☐ Dashboards show top-selling wines and laggards
- ☐ Inventory and sales trends are visible at a glance
 - ☐ Custom reports are easy to generate and export
- ☐ Club performance and DTC sales metrics are trackable

Scoring Your Readiness

- ✓ 30–36 checks: You're operating like a modern, data-driven winery—keep innovating.
- ✓ 20–29 checks: You're on the right track—prioritize the gaps that cause the most friction.
- ✓ 10–19 checks: Time for a tech tune-up—opportunities for automation and efficiency abound.
- ✓ 0–9 checks: You're overdue for a digital transformation—your future self will thank you.