



Year-End Winery Data Review Checklist

Use this checklist to evaluate performance, identify trends, and build a confident strategy for 2026.

1. Revenue & Channel Performance

Review where revenue came from and how it shifted YoY.

- Total DTC revenue YoY comparison
- Revenue by channel:
 - □ Tasting Room
 - □ Wine Club
 - □ eCommerce
 - □ Wholesale/on-premise (if applicable)
- Average Order Value (AOV) trends
- Order volume by month & seasonality mapping
- Revenue per visitor (RPV) in tasting room
- Source of first-time purchasers (how they found you)

Key questions:

- What channels are growing fastest?
- Any unexpected peaks, dips, or red flags?

2. Wine Club & Loyalty

Analyze retention, growth, and engagement.

- Total net membership change YoY (growth vs. churn)
- Signup source breakdown (TR, online, events, referrals)
- Retention rate vs. industry benchmarks
- Shipments on time and error rates
- Club revenue per member (LTV indicators)
- Cancellation reasons categorized and ranked
- Member purchase behavior outside shipments

Key questions:

- What keeps members engaged and what causes them to leave?

3. Product & Inventory Performance

Spot what's driving profit and what's dragging.

- Top sellers by revenue and margin
- Slow movers and dead inventory
- SKU performance by channel
- Sell-through on key releases
- Seasonal alignment of production vs. sales

Key questions:

- Are we producing what customers actually want?

4. Digital & eCommerce

Understand the online visitor → buyer funnel.

- □ Website traffic by source (organic, paid, social, email)
- □ Conversion rate: visits → cart → purchase
- □ Cart abandonment patterns
- □ Device usage breakdown (desktop vs. mobile)
- □ Email campaign performance (open, click, conversion)
- □ SMS engagement and opt-in growth (if used)

Key questions:

- Is our digital storefront removing friction or creating it?

5. Tasting Room Operations

Track guest experience → revenue correlation.

- □ Traffic and booking trends (walk-in vs. reservation)
- □ Conversion: visitors → purchasers → club signups
- □ Staffing vs. guest review trends
- □ Event attendance and post-event sales lift
- □ Average tips and service quality indicators

Key questions:

- How effectively are we converting hospitality into loyalty?