

# Wine club membership management

Automates wine club membership enrollment, preference collection, and shipment scheduling while personalizing member communications and tracking engagement metrics.

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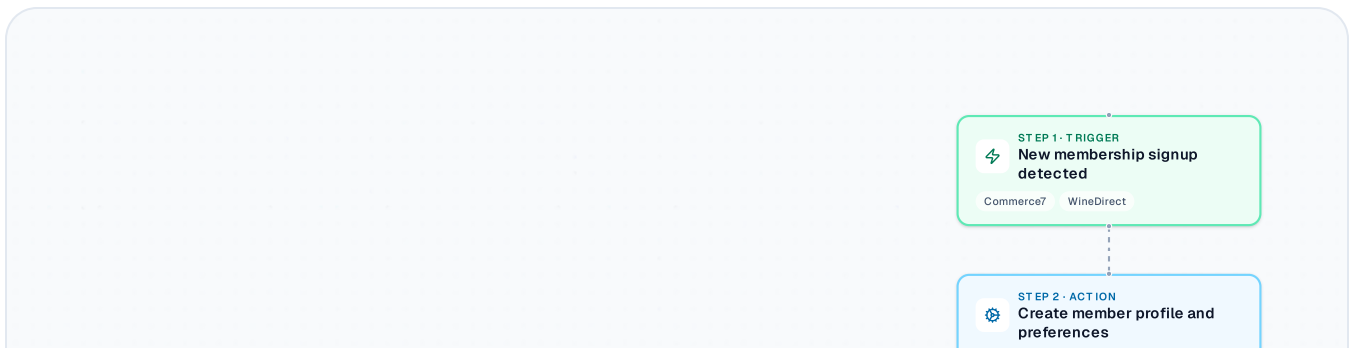


## WORKFLOW TRIGGER

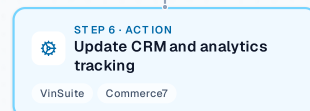
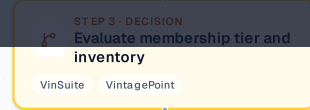
Customer completes wine club signup form on winery website

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.



WineDirect VinSuite



## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

## New membership signup detected

Customer submits wine club enrollment form with contact details, wine preferences, and membership tier selection. System captures initial data and triggers the automated onboarding process.

Commerce7

WineDirect

2

 ACTION

## Create member profile and preferences

System creates comprehensive member profile including wine preferences, dietary restrictions, delivery schedule, and payment information. Profile is synchronized across all customer-facing systems.

WineDirect

VinSuite

3

 DECISION

## Evaluate membership tier and inventory

System checks selected membership tier against current wine inventory levels and determines if preferred wines are available. Routes to appropriate fulfillment path based on stock availability.

VinSuite

VintagePoint

4

 ACTION

## Generate personalized shipment plan

Creates customized quarterly shipment schedule based on member preferences, inventory availability, and seasonal wine releases. Sets up automated billing cycles aligned with shipment dates.

5

ACTION

### Send welcome package and communications

Automatically sends personalized welcome email with membership benefits, shipment schedule, and exclusive member portal access. Schedules follow-up engagement communications based on member tier.

Commerce7

WineDirect

6

ACTION

### Update CRM and analytics tracking

Records new member data in customer relationship management system and initializes tracking for engagement metrics, purchase behavior, and retention analytics.

VinSuite

Commerce7

7

OUT PUT

### Member onboarding completion report

Generates comprehensive onboarding summary including member profile, shipment schedule, and initial engagement metrics for winery staff review.

WineDirect

VinSuite



## Outputs

- Active wine club member profile
- Automated quarterly shipment schedule
- Personalized member communication sequence
- Member onboarding completion report



## Key Metrics

- Member enrollment conversion rate
- Average membership tier selection
- Member engagement score
- First shipment delivery success rate



## Tools & Integrations

- Commerce7
- WineDirect
- VinSuite
- VintagePoint

## AI Business OS

## AI Business OS

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