
SAVVY

DIGITAL MARKETING CHECKLIST FOR WINE BRANDS READY TO GROW ONLINE SALES.

A practical, platform-by-platform audit to help you identify what's working, what's missing, and where to focus next.



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Instagram **LinkedIn**

WEBSITE & SEO

Make it easy for the right people to find you, buy from you, and come back for more.

Your website is your digital cellar door - built to convert, not just look good. And if people can't find it, they can't buy from you. This section helps you check whether your site is set up to attract traffic, guide the journey, and drive consistent DTC sales.

CHECKLIST

Website Structure & User Experience

- Simple navigation and user-friendly design that helps visitors find and purchase products quickly
- Clear CTAs and fast, secure checkout that reduce friction and increase conversion
- Shipping info, FAQs, and contact details are easy to find and remove buyer hesitation
- Site structure is clean with proper headings (H1, H2, etc.) for readability and SEO
- Email list is easy to join via forms, pop-ups, or checkout opt-in to support DTC retention
- Subscription club offering is easy to find, easy to join, and clearly explains the benefits
- Mobile experience is prioritised, tested regularly, and optimised for high mobile conversion

Content & SEO Fundamentals

- Product and collection pages include tasting notes, keywords, and persuasive, SEO-friendly copy
- Each page has a unique, optimised title tag and meta description to support organic traffic and sales
- Alt text is used on all images to support SEO and accessibility
- Blog content targets relevant keywords like food pairings and wine region travel
- Internal linking connects products, blogs, and key pages to guide users deeper into the purchase funnel

Tracking & Local Visibility

- Google Analytics, Meta Pixel, and Google Search Console are set up to track and improve sales performance
- Local SEO is up to date (Google Business Profile, ATDW, social media, etc.)
- Site speed is optimised to reduce bounce rate and improve conversion

EMAIL MARKETING

Turn casual browsers into loyal customers.

Email is one of the most powerful drivers of DTC sales. It keeps your brand top of mind, encourages repeat purchases, and builds loyalty over time. This section helps you check whether the right flows, campaigns, and segmentation are in place to turn casual customers into long-term buyers.

CHECKLIST

Automated Flows

- Welcome flow with at least 3–5 emails
- Abandoned Cart and Browse Abandonment flows trigger within 1 hour
- Post-purchase flow that thanks, educates, and upsells
- Win-back flow to re-engage lapsed customers after a set period

Campaign Strategy & Segmentation

- Regular campaigns (at least 1–2 per month)
- Campaigns align with key sales moments (e.g. product launches, club offers, seasonal promotions)
- Segmented lists for product interest, VIPs, and lapsed customers
- Email list is regularly cleaned to remove unengaged subscribers

Optimisation & Performance

- Emails are mobile-optimised and include strong CTAs
- Emails use personalisation (e.g. first name, behaviour-based content)
- Subject lines, layouts, and CTAs are regularly A/B tested
- Send times are reviewed and optimised based on performance
- Clear tracking of open rate, click-through, and revenue per campaign
- Repeat purchase rate from email is tracked and reviewed regularly

ORGANIC SOCIAL MEDIA

Helping your content build trust, tell stories, and drive sales - organically.

Social media isn't just about being visible - it's about being valuable. When used strategically, organic content builds trust, tells your brand story, and nudges people toward purchase. This section helps you check whether your feed is working as a quiet salesperson, not just a content board.

CHECKLIST

Content & Planning

- Posting is consistent (minimum 2–3 times per week) across all relevant platforms
- Content mix is evenly spread through the pillars of Promotion, Education, Community
- Content is planned around customer journey stages: awareness, consideration, and conversion
- High-margin products and offers are promoted consistently with clear purchase paths

Branding & Messaging

- Visual identity is consistent and easily recognisable across posts
- Tone of voice is defined, documented, and used consistently in captions
- Captions include purposeful CTAs that direct followers to take action (click, sign up, buy)

Execution & Performance

- Profile bio, links, and Story Highlights are optimised to guide visitors toward purchase or sign-up
- Link in bio is regularly updated with relevant destinations (campaigns, products, lead magnets)
- Stories and Reels are used strategically to boost visibility and engagement
- Engagement (comments, DMs, shares) is responded to promptly and in brand tone
- Social insights are reviewed monthly to inform future content
- Social content performance is tracked through to website visits, email sign-ups, or sales
- Organic social is integrated with paid ads, email, and website messaging
- Social presence and strategy are reviewed at least quarterly to stay aligned with business goals

PAID SOCIAL MEDIA

Turn attention into action with smarter targeting, creative, and strategy.

Paid ads should do more than just reach people, they should drive meaningful action. When set up strategically, Meta Ads can bring in high-intent traffic, convert first-time buyers, and re-engage lapsed customers. This checklist helps you identify whether your campaigns are working as part of a broader DTC strategy - or just ticking the boost button.

CHECKLIST

Campaign Strategy & Structure

- Campaigns are structured by funnel stage: cold (awareness), warm (consideration), and conversion (retargeting)
- Objectives are clearly defined and aligned with business goals (traffic, sales, lead gen)
- Budget is allocated according to funnel performance and seasonal priorities

Targeting & Tracking

- Pixel is installed correctly and tracking key events (add to cart, purchase, etc.)
- Retargeting audiences are built from website visitors, engagers, and email lists
- Lookalike audiences are tested based on high-value customer behaviours

Creative & Messaging

- Creative is tailored to each audience segment and funnel stage
- UGC-style content is tested alongside more polished brand creative
- Copy is written with a clear hook, benefit, and CTA
- Landing pages are aligned with the ad's promise and user expectations

Measurement & Optimisation

- Performance is reviewed and optimised weekly (at minimum)
- Key metrics tracked: ROAS, CPA, CTR, conversion rate, AOV
- Underperforming ads are paused or revised based on data
- Learnings are documented to guide future campaigns

REPORTING & ANALYTICS

If you're not using your data to drive revenue, what's the point?

Data is your most powerful decision-making tool. The goal isn't just to track what happened, it's to uncover what's driving results and where to double down. This section helps you check whether your reporting connects your marketing activity to real business outcomes like revenue, retention, and repeat purchase.

CHECKLIST

Measurement Foundations

- DTC goals are clearly defined and aligned with key metrics (e.g. revenue, AOV, LTV)
- Tracking tools are in place and working (GA4, Meta Pixel)
- Conversion events are mapped (e.g. purchases, club joins, email sign-ups)

Performance Review

- Email, social, and ad performance are reviewed regularly with a focus on revenue impact
- Website metrics are monitored (conversion rate, bounce rate, traffic sources, repeat purchases)
- Campaign reporting focuses on outcome metrics (not just engagement)

Strategic Use of Insights

- Insights are used to adjust targeting, messaging, and timing
- Reports prioritise what actions will be taken next
- Vanity metrics (likes, followers, opens) are deprioritised in favour of DTC growth
- Reporting cadence is consistent and shared with the team or partners

SPOTTED A FEW GAPS?

This checklist might have revealed one or two things to tighten up ... or a whole lot more. And that's completely normal.

Most beverage brands are too busy making great products to keep up with every piece of the digital marketing puzzle.

That's where I come in.

I work with brands across the drinks industry to turn clarity into strategy, and strategy into sales. If you're ready to grow your DTC revenue with a smarter, more focused approach, I'd love to help.

Ready to make your marketing work harder? Book a free intro call.

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