The 5-Minute Digital Checkup

For Wine Bars, Tasting Rooms & Craft Breweries

Most boutique beverage operations are leaving money on the table — not because of bad marketing, but because their systems don't talk to each other. This quick self-assessment highlights the gaps that matter most in 2026. It draws on 25 years of building digital systems for Fortune 100 brands, scaled to the reality of independent hospitality.

No fluff. No scores. Just honest questions that point to where the friction lives.

1. Your Customer Data

Your POS, email platform, and club management tool each hold a piece of the customer. If those pieces don't connect, you're marketing to fragments.

- ■ Can you pull a single customer's full history — visits, purchases, club status — from one place?
- ■ Do you know which email or SMS campaign drove last month's revenue?
- ■ When a guest visits your tasting room, does an automated follow-up fire within 48 hours?

If you checked zero: your data is a filing cabinet, not a decision tool.

2. The Digital Guest Experience

Customers don't think in channels. They think in moments — and most of those moments happen on a phone.

- ■ Can a guest discover you, browse, and check out without pinching or zooming on mobile?
- ■ Do returning members reorder in one click with saved payment methods?
- ■ Is your membership pitched around story and access — not just a discount?

If checkout takes more than two taps, you're losing people at the peak of their intent.

3. Discovery & AI Readiness

Search is shifting. AI agents are already recommending wines, breweries, and tasting experiences. If your product data isn't structured, those agents can't find you.

- ■ Are your tasting notes, food pairings, and serving details published in structured format — not just a PDF or Instagram caption?
- ■ Do your welcome, reorder, and thank-you workflows run automatically?

The brands that show up in AI-driven recommendations will be the ones with clean, structured data. This is table stakes by late 2026.

4. The Stack That Holds It Together

Unified commerce isn't a buzzword — it's plumbing. Here's the minimum functional stack for a boutique operation that wants predictable revenue:

What It Does	Why It Matters
Integrated CRM	One source of truth for every customer interaction.
Unified POS	Real-time inventory sync across bar and online store.
Lifecycle Automation	Behavior-triggered email and SMS — not batch blasts.
Compliance Engine	Age verification and volume limits handled automatically.

- ■ Do you have all four in place — and are they actually connected?

What This Tells You

7–8 checks: Your systems are working. You're likely optimizing, not rebuilding.

4–6 checks: The foundation exists, but revenue is leaking through the gaps between tools.

0–3 checks: You're running a modern hospitality business on disconnected infrastructure. The good news: the fixes are well-understood.

Next Step

This checkup identifies surface-level friction. The deeper work — attribution modeling, lifecycle design, membership economics, agentic readiness — is where predictable revenue gets built.

My Pub Marketing provides fractional digital operations for independent beverage brands. Enterprise-grade systems. No agency overhead. No buzzwords.

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