

AVALON RETENTION MARKETING

KETCHAM ESTATE WINERY

Email & SMS Lifecycle Marketing Strategy

Healdsburg · Sonoma County, California

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01

Brand Overview

Ketcham Estate Winery sits in Healdsburg, in the heart of Sonoma County and one of the most celebrated winegrowing regions in the United States. It is a small, boutique, estate-grown and woman-owned house with a singular focus on Pinot Noir.

Positioning

Small · Boutique · Estate-grown · Woman-owned · Pinot Noir focused

Core Selling Propositions

The brand competes on feeling and rarity, not price. Every touchpoint should reinforce these levers:

- **Scarcity:** limited estate production that rewards early, loyal buyers.
- **Story & Place:** the land, the vintages, and the people behind them.
- **Founder Personality:** a woman-owned estate with a voice, not a faceless label.
- **Wine Club Loyalty:** the retention engine and the brand's inner circle.
- **Tasting-Room Experience:** the in-person moment that creates lifelong fans.
- **Emotional Connection to the Land:** belonging, not just a bottle.

What We Are Really Selling

A bottle from Ketcham carries far more than wine. The value the customer pays for is:

Place + Story + Taste + Memory + Status + Belonging

02

Target Markets

Ketcham's audience is not a single buyer. It is five distinct groups, each with a different relationship to the brand and a different reason to buy. The marketing speaks to each one in its own language.

SEGMENT	WHAT THEY WANT	PRIORITY
Enthusiasts & Collectors	Story, rarity, library & allocation access	High, year-round
Wine-Country Tourists	To relive the visit from home	High, post-visit
Gift Buyers	An easy, premium gift	Seasonal only
Local & Regional Loyalists	Insider access & belonging	High, inner circle
Premium Casual Drinkers	A nice bottle that feels special	Medium, nurture

01 • Wine Enthusiasts & Collectors

Deeply knowledgeable about varietals and regions. They don't need education. They need story. They're the strongest candidates for the wine club, limited drops, case purchases, library releases, and seasonal allocations.

Marketing angle *Lead with limited releases, the thinking behind specific production choices, and the story of the region, the estate, and the people behind it. "Sonoma County" is a given to them; the differentiator is the narrative.*

02 • Wine-Country Tourists

People visiting Healdsburg and Sonoma for the experience. The region draws millions of visitors annually, with overnight guests spending roughly \$389 per day.

Source: Sonoma Valley tourism statistics

They rarely discover Ketcham online. They discover it in the tasting room, and that moment can be converted into long-distance loyalty.

In practice

A couple from Colorado road-tripping to San Francisco spend a day in Wine Country and book the Ketcham tasting. They fall for the wine. Back home, a well-timed email arrives, and they reorder a bottle directly from the site. That is the entire conversion path, and it runs on email.

03 • Gift Buyers

Wine is inherently gift-friendly, especially for affluent buyers around the holidays, corporate gifting, birthdays, weddings, and anniversaries.

Priority *Target this segment during the holiday window only. It is less valuable per customer than the others, so it earns seasonal attention rather than year-round investment.*

04 • Local & Regional Loyalists

Bay Area and Northern California residents who love wine and want to support a local estate. These are the natural members of the brand's loyalty and inner-circle program: the people who get special-access discounts, tours, and early allocations.

Marketing angle *Belonging and access. Make them feel like part of the estate, not just a mailing list.*

05 • Premium Casual Drinkers

Not as expert as the collectors, but they can tell a good bottle from a bad one. They buy nice wine for dinners, hosting, date nights, holidays, and personal treats, and they recognize the cultural cachet of California wine country.

Marketing angle *Sell the premium feel and the occasion. This region already reads as "special" to them, so reinforce it.*

03

Email & SMS Marketing Strategy

Retention runs on two systems. Flows are automated sequences triggered by customer behavior, like a visit or a purchase. Campaigns, in the next section, are broadcasts sent to the list on a calendar.

The Goal

Convert the in-person moment into a lasting online relationship, then deepen it until buying Ketcham becomes a habit, not a decision.

RECOMMENDED FLOWS

01 • Tasting Room Follow-Up Flow

Angle “Bring Healdsburg Home.”

Capture the visitor’s email at the tasting. About a week after they’re marked attended, enroll them in a sequence built to convert that in-person experience into an online order. This is the highest-leverage flow for the tourist segment.

02 • Wine Club Nurture & Upgrade Flow

The wine club is the retention engine, so it deserves the most flow infrastructure. Build sequences around joining, onboarding, shipment reminders, allocation previews, referral and gifting, and member-only exclusives. The goal is to move casual members into the inner circle and keep them there.

03 • Post-Purchase Education Flow

Skip the generic “Thanks for your order.” These emails should teach: how to store the wine, when to open it, what to pair it with, the winemaking choices behind it, and the story of the vintage. Education builds appreciation, and appreciation builds repeat purchases.

04 • VIP Flow

For customers who consistently reorder online, enroll them in a flow that rewards them with perks, early access, and exclusivity. These are the most valuable buyers on the list, so the program should make them feel like insiders, not subscribers.

05 • Abandoned Cart with Premium Positioning

Less discounting, more desire. Recover carts with scarcity, tasting notes, shipping reassurance, and “limited estate production” language rather than price cuts. Protect the premium feel; a discount-led cart flow would cheapen the brand it’s meant to sell.

04

Email Campaigns

Flows run automatically in the background. Campaigns are the broadcasts sent to the list on a calendar. These five themes keep Ketcham in front of buyers and sell the wine without ever feeling like a discount blast.

The Goal

Increase wine sales by keeping customers engaged with premium, story-driven campaigns that inspire repeat purchases, seasonal orders, and wine club signups.

CAMPAIGN THEMES

01 • “From the Estate” Campaign

Talk about the vineyard: the weather, harvest, bottling, pruning, fog, soil, barrels, estate life, or what the team is tasting right now. Instead of saying “buy Pinot Noir,” this campaign sells the story behind the Pinot Noir.

02 • “Winemaker’s Notes” Campaign

The educational theme. Not wine 101, but topics like why Pinot Noir changes so much from site to site, what makes Russian River Valley Pinot distinct, and what “estate-grown” actually means. These still promote the wines, but they do it in a premium way.

03 • “Open This With...” Campaign

Wine is rarely consumed in the abstract. It attaches to food, dinner, celebration, hosting, date night, and holidays. This campaign pairs the wine with food and occasion: roast chicken, salmon, mushroom risotto, backed by easy, high-quality recipes. A direct product push that never reads like one.

04 • “Limited Allocation” Campaign

Luxury does not need discounts. Luxury needs access. Use scarcity carefully and honestly, reserved for real releases, low inventory, library wines, seasonal shipments, and club-first access.

05 • Seasonal Campaigns

Wine is built for holidays and occasions: Thanksgiving, Christmas, Valentine’s Day, Mother’s and Father’s Day, summer dinners, harvest season, corporate gifting, and wedding season.