

3C SQUARED MINI-WORKBOOK

Wine Upselling Without the Awkward

Helpful pairing language, guest-first scripts,
and a simple wine knowledge system.

CARE • CONNECTION • CULTURE

Created for servers, managers, and trainers who want wine recommendations
to feel like hospitality, not pressure.

\$5.99 DIGITAL PRODUCT

3C SQUARED MINI-WORKBOOK

How to Use This Workbook

This is a fast, practical guide for turning wine knowledge into guest care.

This workbook is built for real shifts, not wine-school perfection. The goal is not to turn every server into a sommelier. The goal is to give every server enough confidence, language, and structure to make one helpful recommendation at the right moment.

The 3C Promise

Wine upselling works best when it is rooted in **Care** for the guest, **Connection** to what they are ordering, and **Culture** that trains every server instead of relying on one natural salesperson.

- **Servers:** use the scripts and worksheets to learn your restaurant's actual wine list.
- **Managers:** use the pre-shift system and coaching questions to make wine knowledge repeatable.
- **Trainers:** turn each page into a 10-minute pre-shift lesson or a new-hire activity.
- **Owners:** remember that better wine sales should also mean better guest experiences.

The standard is simple: if the recommendation feels helpful, specific, and connected to the guest's meal, it belongs. If it feels like pressure, it needs to be rewritten.

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Wine Is Hospitality, Not a Hustle

The oldest version of restaurant work was about restoring people. Wine belongs in that story.

The word restaurant comes from Latin *restaurare*, meaning to renew, and originally referred to restorative broths rather than a building.¹ That matters because it reminds us that hospitality began with care: restoring the traveler, the guest, the person who arrived hungry, tired, or uncertain.

Shared meals sit at the center of human culture and are tied to trust, social connection, and the experience of belonging.⁴ A server who helps a table choose a wine is not just increasing a check. Done well, they are helping the table share the meal more fully.

Wine service has been part of hospitality for centuries. Ancient hosts even prized the skill of mixing wine and water for guests as a craft worthy of honor.³ The modern version is simpler: know what you have, listen to the guest, and make the match feel thoughtful.

3C Translation

Care asks, “What would make this guest’s meal better?” Connection asks, “What are they already telling me through their order?” Culture asks, “Have we trained every server to answer those questions?”

Sources on this page:

1. Merriam-Webster: <https://www.merriam-webster.com/wordplay/the-history-of-restaurant>
4. Jönsson, Michaud & Neuman 2021: <https://pmc.ncbi.nlm.nih.gov/articles/PMC8295993/>
3. Inns of Greece & Rome: <https://elfinpell.com/ClassicalTexts/Firebaugh-TheInnsOfGreeceAndRome/Chapter6.html>

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The Guest-First Wine Framework

A wine recommendation should happen for the guest, not to the guest.

Danny Meyer describes hospitality as a dialogue, not a monologue, and says it is present when something happens *for* the guest instead of *to* the guest.¹¹ That is the line between a helpful wine suggestion and a pushy upsell.

The Court of Master Sommeliers also teaches that the guest's subjective taste is the most important factor in pairing.⁵ That means servers do not have to prove they are wine experts. They need to ask better questions and translate the answer into a recommendation.

- **Ask:** “Are you in the mood for something lighter, richer, fruitier, or drier tonight?”
- **Connect:** “Because you chose the salmon, I would stay with something bright enough to cut the richness.”
- **Offer:** “We have a glass that works beautifully, or if the table is sharing, the bottle is the better value.”
- **Release pressure:** “No pressure at all. I just wanted you to know why it pairs well.”

Server Standard

A recommendation is not a command. It is a bridge between what the guest ordered and what could make that order more enjoyable.

Sources on this page:

11. Danny Meyer, Setting the Table excerpt: <https://learn.bigredf.com/files/2014/08/DannyMeyer-SettingtheTable-Cliffs.pdf>

5. Court of Master Sommeliers: <https://courtofmastersommeliers.org/wp-content/uploads/2022/11/Food-and-Wine-1.pdf>

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Know the List and the Why

Servers cannot confidently recommend what they do not understand.

Wine training relates to how much wine a restaurant sells, and servers are more likely to suggest a pairing when they know what to say.⁸ This is why a wine program cannot live only in the manager's head or on a printed list.

Every server needs a simple answer to three questions: What is this wine like? What food does it help? Why is it on our list? If they cannot answer those questions in plain language, the restaurant has not given them a usable system.

Question	Your answer
Wine	
Taste in plain words	
Best menu match	
Why it is on our list	
One sentence to say tableside	

Culture Check

If only one person on the floor can explain the wine list, that is not a wine program. That is a person holding the whole system together.

Sources on this page:

8. Oregon State University PACE: <https://blog.pace.oregonstate.edu/boost-wine-sales-at-your-restaurant-5-proven-tips-from-industry-pros>

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Pairing Basics Servers Can Actually Use

Pairing is not exact science. It is structured common sense.

Wine pairing has no exact science, but there are reliable principles servers can use immediately.⁵ Wine Folly summarizes several beginner-friendly rules: choose wine more acidic than the food, choose wine sweeter than the food, match flavor intensity, and match the sauce more than the meat.⁶

Cue	Server shortcut
Rich dish	Choose enough body or acid to keep it balanced.
Sweet dish	Choose wine as sweet or sweeter than the food.
Bold flavors	Match intensity; delicate wine can disappear.
Sauce-driven dish	Pair with the sauce, not just the protein.
Regional dish	Try what grows together, goes together.

The shortcut “what grows together goes together” is also useful because regional food and regional wine often developed alongside each other.⁷ Italian tomato-based pasta and Sangiovese is not a magic trick. It is culture, geography, and flavor working together.

Training Reminder

The point is not to memorize every pairing. The point is to give servers a reliable starting place so they can speak with confidence.

Sources on this page:

5. Court of Master Sommeliers: <https://courtofmastersommeliers.org/wp-content/uploads/2022/11/Food-and-Wine-1.pdf>

6. Wine Folly Pairing Basics: <https://winefolly.com/wine-pairing/getting-started-with-food-and-wine-pairing/>

7. Wine Folly Simple Pairing: <https://winefolly.com/wine-pairing/simple-food-and-wine-pairing/>

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The Main-Course Bottle Moment

The best bottle sale often begins as a helpful pairing after the entrée order.

Restaurant wine guidance recommends pairing suggestions that connect directly to the food order and use plain, guest-friendly language.⁸ The timing matters: after guests choose the main course, the server can make the recommendation feel relevant instead of random.

The Formula

Dish + reason + option.

"With the short ribs, I would go with the Malbec. It has enough body for the richness without feeling too heavy. If the table is sharing, the bottle makes more sense than four glasses."

- **Do not start with price.** Start with the meal.
- **Do not ask "Do you want wine?"** Offer a reason.
- **Do not recommend the most expensive bottle by default.** Recommend the best fit.
- **Do not disappear after suggesting.** Give them room, then return.

This is where care and revenue can work together. The guest gets a better meal experience. The restaurant increases check average. The server earns confidence instead of feeling awkward.

Sources on this page:

8. Oregon State University PACE: <https://blog.pace.oregonstate.edu/boost-wine-sales-at-your-restaurant-5-proven-tips-from-industry-pros>

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The Dessert-Wine Moment

Dessert is not the end of selling. It is the second chance to enhance the meal.

The dessert rule is simple: the wine should be at least as sweet as the dessert. Otherwise, the dessert can make the wine taste sharp or bitter.¹⁰ The Court of Master Sommeliers makes it even easier to remember: “Sweets need sweets.”⁵

Dessert	Wine idea	Why it works
Dark chocolate	Port	Sweetness balances bitterness.
Cheesecake / crème brûlée	Sauternes	Sweetness plus acidity cuts richness.
Fruit tart / light dessert	Moscato d'Asti	Light, sweet, and not overpowering.

Server Line

“If you are sharing dessert, I would also consider two small pours of the Port. With the chocolate, it brings out the richness instead of fighting it.”

Dessert wine should never feel like a last-minute money grab. It should feel like the server noticed the table still had one more opportunity to enjoy the meal.

Sources on this page:

5. Court of Master Sommeliers: <https://courtofmastersommeliers.org/wp-content/uploads/2022/11/Food-and-Wine-1.pdf>

10. BetterWineTaste: <https://eu.betterwinetaste.com/blogs/all-about-wine/wines-desserts-pairings>

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Words That Help Guests Decide

Plain language beats wine jargon almost every time.

Research on descriptive menu labels has found that sensory language can increase selection and perceived value, though the widely cited 27% figure should be treated as indicative because of later unrelated author caveats.¹²¹³ The practical lesson still matters: honest words help guests picture the experience.

Wine-training guidance recommends plain descriptions such as “light and citrusy, great with seafood” instead of technical language that makes guests feel tested.⁸

Instead of	Say this
“It’s dry.”	“It’s crisp, clean, and not sweet.”
“It has tannins.”	“It has enough structure for the steak.”
“Do you want wine?”	“That dish has a great wine match if you’re interested.”
“This is expensive.”	“This bottle is the best fit for the table if you’re sharing.”

3C Rule

If the guest would not say the word, think twice before using it. “Bright and crisp” usually helps more than “high acid with mineral tension.”

Sources on this page:

12. Wansink et al. 2001: <https://e-biblos.berjaya.edu.my/e-biblos.berjaya.edu.my/content/files/Online-articles/Descriptive%20menu%20labels%20effect%20on%2>

13. Retraction caveat summary: <https://opnclo.com/blog/digital-menu-sales-statistics>

8. Oregon State University PACE: <https://blog.pace.oregonstate.edu/boost-wine-sales-at-your-restaurant-5-proven-tips-from-industry-pros>

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Reading the Table

Personalization is what makes the suggestion feel like hospitality.

Because the guest's preference is the most important pairing factor, the best recommendation starts with listening.⁵ Hospitality is a dialogue that requires listening with every sense.¹¹

- **Celebration table:** offer a bottle or sparkling option because sharing matters.
- **Date night:** keep the tone warm and confident without hovering.
- **Business meal:** offer one safe, balanced option and make ordering easy.
- **Budget-conscious table:** recommend the best-value glass or bottle without making them feel small.
- **Unsure guest:** ask lighter/richer or dry/fruity; do not bury them in regions and grapes.

Two-Line Practice

Guest: "I don't really know wine."

Server: "That's completely fine. Do you usually like something lighter and crisp, or something smoother and richer? I can point you to one that fits the food."

When the table feels understood, the suggestion feels relevant. Relevance is the difference between selling and serving.

Sources on this page:

5. Court of Master Sommeliers: <https://courtofmastersommeliers.org/wp-content/uploads/2022/11/Food-and-Wine-1.pdf>

11. Danny Meyer, Setting the Table excerpt: <https://learn.bigredf.com/files/2014/08/DannyMeyer-SettingtheTable-Cliffs.pdf>

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The 10-Minute Pre-Shift Wine System

Do not rely on personality. Build a small repeatable habit.

Short pre-shift tastings, pairing cheat sheets, and simple wine-list organization help servers build confidence over time.⁸ This is the culture piece: restaurants get consistent wine service when they train it consistently.

Time	Action
1 min	Pick one wine and one dish.
2 min	Taste or smell if allowed; review plain-language notes.
2 min	Manager explains why the pairing works.
3 min	Servers practice one sentence out loud.
2 min	Ask: who will you recommend this to tonight?

Manager Standard

Do not tell servers to “sell more wine.” Give them one wine, one pairing, one plain-language sentence, and one chance to practice before the shift starts.

The goal is not to make the pre-shift longer. The goal is to make one minute of the shift more useful.

Sources on this page:

8. Oregon State University PACE: <https://blog.pace.oregonstate.edu/boost-wine-sales-at-your-restaurant-5-proven-tips-from-industry-pros>

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Manager Coaching and Metrics

Measure sales, but coach the guest experience too.

Presentation can shape buying behavior: Cornell research found menu price formats without dollar signs produced higher spending per party than formats with dollar signs or scripted prices.⁹ The lesson for managers is that systems matter. Guests make choices inside the environment restaurants create.

Training, menu placement, and confidence-building are all part of that environment.⁸ A restaurant should coach wine sales as a service behavior, not only a revenue target.

- **Track:** wine attachment rate, bottle sales, dessert-wine mentions, and average check.
- **Also track:** guest comments, confidence, and whether servers use specific pairing language.
- **Reward:** helpful recommendations and guest-first behavior, not pressure.
- **Coach:** one script at a time. Review what worked, then role-play the next improvement.

Culture Check

If average check goes up while guest trust goes down, the system is broken. Upselling should protect the relationship.

Sources on this page:

9. Cornell / IJHM 2009: <https://ecommons.cornell.edu/server/api/core/bitstreams/b93cf159-e20c-4b62-80d3-a1580fbe1a05/content>

8. Oregon State University PACE: <https://blog.pace.oregonstate.edu/boost-wine-sales-at-your-restaurant-5-proven-tips-from-industry-pros>

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Worksheet: Build Your Wine Knowledge Cards

Complete this for every by-the-glass wine and your top bottle recommendations.

Wine Knowledge Card 1

Wine name:

Plain-language taste:

Best food match:

Why this wine is on our list:

Tableside sentence:

Wine Knowledge Card 2

Wine name:

Plain-language taste:

Best food match:

Why this wine is on our list:

Tableside sentence:

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Worksheet: Pair the Menu

Choose five dishes from your actual menu and write one guest-friendly wine line for each.

Dish	Main flavor/richness	Wine idea	One sentence to say

Reflection

Which recommendation feels most natural? Which one needs better language before you use it at a table?

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Practice Scripts

Use these as starting points. Make them sound like you.

Script

Main-course glass: “With that chicken dish, I would go with the Chardonnay by the glass. It has enough body for the sauce, but it still stays bright.”

Script

Bottle for the table: “Since three of you ordered steak, the Cabernet is probably the better value as a bottle, and it will hold up nicely with the richness.”

Script

Dessert wine: “If you are doing the chocolate dessert, the Port is worth considering. It is sweet enough to work with the chocolate instead of tasting bitter next to it.”

Script

Graceful no: “Absolutely. I just wanted you to know why it works. I’ll keep the waters full and check back once the entrées are down.”

Script

Unsure guest: “No problem. Do you usually like lighter and crisp or smoother and richer? I’ll keep it simple.”

Rewrite Exercise

Pick two scripts and rewrite them in your own voice. Then practice them out loud before using them with a table.

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Quick Quiz and Team Discussion

Use this after a pre-shift training or as a new-hire check-in.

1. What is the difference between a helpful wine recommendation and a pushy upsell?

2. Why should the guest's preference come before the pairing rule?

3. Name one wine that works with a rich main course and explain why.

4. What does “sweets need sweets” mean?

5. Write one plain-language description of a wine on your list.

6. When is the best time to suggest a bottle for the main course?

7. What should you say if the guest declines the recommendation?

8. What is one thing managers can do in pre-shift to build wine confidence?

Final 3C Reflection

Care: Did I improve the guest's experience? Connection: Did I match the recommendation to the table? Culture: Did our team have a system that made this possible?

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Closing Note

Wine upselling should make the meal feel more complete.

Hospitality is not what we get guests to buy. It is how we make them feel while they are choosing.¹¹ When wine is recommended with care, it becomes part of the guest's experience instead of an interruption.

The best servers are not the ones who push the hardest. They are the ones who notice, listen, connect, and make the next part of the meal easier to enjoy.

That is the standard: wine knowledge in service of the guest, supported by a culture that trains people well enough to use it.

Sources on this page:

11. Danny Meyer, Setting the Table excerpt: <https://learn.bigredf.com/files/2014/08/DannyMeyer-SettingtheTable-Cliffs.pdf>