Gmail Greg Hogue <greg.hogue@gmail.com>

Sales Rep Login - Prototype

5 messages

Greg Hogue <greg.hogue@gmail.com> Mon, Oct 13, 2025 at 9:27 AM
To: Travis Vernon <travis@wellcraftedbeverage.com>

I started putting together a prototype for the sales rep hub and could use your help understanding what would be beneficial for the rep to see/do in the hub.

https://crm-nu-woad-15.vercel.app/sales/login
l: travis
p: SalesDemo2025

Currently, I'm designing this hub as the all-in-one command center for your sales representatives. Once they log in, they get a complete and personalized overview of their work.

- Live Performance Dashboard: Reps can instantly see their progress with *real-time data (*once we have real-time data set up), including:
    - Monthly and year-to-date sales figures.
    - How close they are to meeting their quota.
    - A list of their top-performing customers.
    - Information on their most recent orders.
- Detailed Client Information: They can access and review every client assigned to them. This includes:
    - Up-to-date contact details and customer metrics.
    - A complete history of past orders.
- Commission Tracking: The hub provides a clear view of their performance and commission data, ensuring everything is current.
- Secure & Personalized: Each rep has their own secure login. They will only ever see the clients, performance numbers, and data that belong specifically to them.

I started an "orders" section but I'm not yet clear exactly what that workflow needs to be like. Also want to consider how the rep will use this when client facing or out in the field to be useful tech rather than just a dashboard.

Let me know your thoughts on what you'd like to see.

-Greg

Travis Vernon <travis@wellcraftedbeverage.com> Mon, Oct 13, 2025 at 10:39 AM
To: Greg Hogue <greg.hogue@gmail.com>

Hey Greg:

I'd want the sales rep hub to be as focused as possible on keeping a salesperson organized around specific objectives. Salespeople need to focus their time on executing. Generally they're not good planners and generally they're not very organized. We'd want this tool to be an enabler of high performance and in order for that to be true, their hub should be structured in such a way that it enhances their system of organization (if not supplants it entirely).

Here are a few components that should get worked into it:

1. Calendar integration so their daily dashboard shows them what they have coming up in the next 7-10 days.
2. Call Plan Tab - The salesperson should be able to create a weekly Call Plan complete with the names of all customers they plan to get in touch with in some way that week, categorized by the type of activity they plan to do with that account and any short-hand notes they need to remind themselves about it. Once completed, this should be visible by the Sales Manager and they should be able to check boxes as they complete the tasks. Types of activities are listed below. It'd be great to see a visual of how their week is weighted. A week that is more heavily weighted to in-person activities is likely to be a successful week. A week that is heavy on electronic follow-ups can be a flag that the week or next week's revenues will be lower than target.
    1. Follow-up or Contact via Email, Text, or Phone
    2. In-Person Visit
    3. Tasting Appointment
    4. Public Tasting Event
3. List of "To-Dos" or "Tasks" from Management that require their attention with an option to check the box and/or enter notes about their progress until it is filed as complete
4. List of customers who are due for an order this week based on their prior order history (e.g., for weekly ordering customers, a list of everyone that needs to order, dynamically updated as orders are entered, and so-on for every other week or every

month...the tool should be intelligent and guide a salesperson accordingly)
5. Reminders - The tool should read their calendar and tell them if they have planning they need to do for a tasting appointment (e.g., selecting the wines to bring) or a Public Event (e.g., ensuring the customer has ordered the wines)
6. List of inactive customers or customers at the risk of going inactive. If a customer hasn't ordered in 45 days it should be flagged as "dormant". If a customer is falling behind their established ordering pace, it should be flagged as "At Risk". Same for a customer who is showing a reduction in average revenue over a defined period of time (after three orders with the company, average monthly revenue should be calculated and customers falling below their monthly average should be flagged).
7. List of product goals with performance against each goal. Target by product, logged sales to-date, performance on pace or below pace?
8. List of current incentives or competitions and tallied performance by product or product line (the Sales Manager should define these and they should then populate to the Account Managers' views as applicable).
9. Recommendations from Tool for additions to schedule or call plan next week based either on analysis of sales data (catching dormant customers before they become dormant, infrequency of logged visits, suggestion by Sales Manager, or To-Dos listed on the customer page)

The Salesperson's Dashboard should look include these components:

- Quarterly Target Revenue & Current Performance (on pace or off?)
- Target Unique Customer Orders Per Week (Current average and current week's total)
- Current Weekly Revenue (versus goal)
- Year-to-date and month-to-date sales performances (but this has to be apples to apples so the system needs to factor in delivery days; we can discuss this to provide context but if the rep's delivery day is Thursday and one month has 5 Thursdays and another 4, they risk looking way ahead or way behind based on something that is out of their control)
- New Customers added this year, last week, and this week (count as "new" when a first order is officially marked as "delivered")
- Dormant customers and % dormancy (how many customers that were serviced in the past year have gone dormant but have not been marked as permanently closed)?
- # of Reactivated dormant customers this year, last week, and this week? % conversion
- Activity Dashboard:
  - # of Tasting Appointments Entered for Week
  - # of In-Person Visits Entered for Week
  - # of Follow-ups or Electronic Contacts Logged by type (call, email, text)
  - % Conversion from Tasting Appointment to Immediate Order (i.e., if a customer ordered during the tasting appointment; measured by appearance of an order during the same week as the tasting appointment)
  - % Conversion from Visit to Order
- To-Do Completion Rate and Average Lead Time to Completion
- # of Clients
- # of Active Clients
- Total YTD Sales (ahead or behind last year's pace)
- Average Client Value
- List of Ordering Clients by Total Value
- Territory Heat Map - Where are sales coming from within the territory, in what value, and in what frequency? Where do new or not yet to order customers reside within the territory?

On Each Client Page:

- YTD Revenue (Ahead or behind last year's pace)
- Total Orders
- Average Order Value
- Last Order
- Projected Next Order Date
- Top 10 Products ordered with total revenue value and total number of cases ordered
- List of any Top 20 Company wines the customer hasn't yet ordered (or sampled)
- Log of visit history (chronological order)
- Total number of products sampled
- List of most recent products sampled (highlight those marked for "follow-up")
- Any urgent "To-Dos" logged against the customer with the due date
- Order history with clickable link to invoices
- Link to Add Activity directly against the customer
- Link to Add Order directly against the customer
- Link to Add "To-Do" directly against the customer
- Any Account Balances or Holds from Management
- Option to list as "Permanently Closed" or "New Buyer In Place"

This is a lot and I'm certain there is more but this would be groundbreaking (at least for Well Crafted) and would take away a lot of the guess work and inefficiency that goes into sales planning and review.

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Greg Hogue <greg.hogue@gmail.com> Mon, Oct 13, 2025 at 8:41 PM
To: Travis Vernon <travis@wellcraftedbeverage.com>

This is great. Got some follow up questions for you (and with future clients in mind):

Performance Metrics and "Pace"

1. To ensure we measure sales performance fairly especially when delivery schedules vary (e.g., a month having 5 Thursdays vs. 4 for a specific route),how do you currently normalize performance to determine if a rep is "on pace"?
    - Should we standardize this by calculating the Average Revenue Per Delivery Day?
2. When is revenue officially recognized for performance metrics and commissions? (Booked, Shipped, Delivered, or Paid?)

Customer Health and Ordering Frequency

3. How should the system determine a customer's "Established Ordering Pace" (e.g., Weekly, Bi-weekly, Monthly) to predict when they are due for an order?
    - Is this a manual tag set by the sales rep?
    - Or, should the system *automatically* classify it based on historical order frequency (e.g., the average interval between their last 5 orders)?
4. Once the pace is established, how many days past their *expected* next order date should trigger the "At Risk" flag? (e.g., If a weekly customer hasn't ordered by Day 9?)
5. For "At Risk (Revenue Reduction)" (calculated after 3 orders): If a customer falls below their established average monthly revenue, what is the percentage threshold for flagging? (e.g., 15% below average?)

Sample Management Workflow

6. When a rep provides a sample, how should it be recorded in the system?
    - **Option A (Inventory Tracked):** Treated as a zero-dollar (or cost-value) order that depletes inventory from a specific "Samples" pool?
    - **Option B (Expense Log):** Just logged as an activity/expense without tracking specific inventory movement?
7. Do reps have a defined "sample budget" (e.g., $X/month or X cases/month) that the system should track and enforce?

Strategic Priorities

8. The Client Page will suggest "Top 20 Company Wines" that the customer hasn't ordered yet. How is this "Top 20" list defined?
9. How often should this "Top 20" list be refreshed (e.g., monthly, quarterly)?

I'm sure other questions will come up but this along with your list gives me a really good start.
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Travis Vernon <travis@wellcraftedbeverage.com> Tue, Oct 14, 2025 at 11:05 AM
To: Greg Hogue <greg.hogue@gmail.com>

Hey Greg:

Replies below.

Performance Metrics and "Pace"

1. To ensure we measure sales performance fairly especially when delivery schedules vary (e.g., a month having 5 Thursdays vs. 4 for a specific route),how do you currently normalize performance to determine if a rep is "on pace"? We compare annually on a week to week basis so for example, we'll look back at the 42nd week of last year to compare this year's sales. So, Week-Over-Week tends to be more accurate than Month-Over-Month. Or, I'll compare a month by finding the average number of delivery days in the month and comparing the revenue per delivery day of each month.
   - Should we standardize this by calculating the Average Revenue Per Delivery Day? I would think that if we can have some standard questions that users answer about their business, the tool could use that in determining how metrics are defined. The problem as I think this through is that on holiday weeks, schedules can shift. Due to customer requests, sometimes schedules can shift. I wonder if I'm trying to fix a moving target here.
2. When is revenue officially recognized for performance metrics and commissions? (Booked, Shipped, Delivered, or Paid?) For us, officially when it's delivered. We mark orders in our system as "delivered" (as a bulk process at the end of the day). This adjusts for any orders that were adjusted or partially returned. Some companies may do this when orders are paid for but for the purposes of this reporting, when product is delivered it should count towards numbers.

Customer Health and Ordering Frequency

3. How should the system determine a customer's "Established Ordering Pace" (e.g., Weekly, Bi-weekly, Monthly) to predict when they are due for an order? I think it should calculate it by using the average time between their orders so it would be dynamic. A customer might start with an average order of 1x every 30 days but change as their order frequency changes.
   - Is this a manual tag set by the sales rep? I'd want almost nothing to be manual entry by rep as that process would break down.
   - Or, should the system *automatically* classify it based on historical order frequency (e.g., the average interval between their last 5 orders)? Precisely.
4. Once the pace is established, how many days past their *expected* next order date should trigger the "At Risk" flag? (e.g., If a weekly customer hasn't ordered by Day 9?) The sooner the better I think. If a customer that orders every week skips a week, you'd want Sales Management and Account Management to be made aware immediately. The sooner you catch attrition the more likely you're to fix it before it becomes a lost customer or placement.
5. For "At Risk (Revenue Reduction)" (calculated after 3 orders): If a customer falls below their established average monthly revenue, what is the percentage threshold for flagging? (e.g., 15% below average?) Yes, I think 15% and this would be a setting that can be tweaked once you see the variability in orders. You can quiet the noise or turn it up based on what you're seeing being flagged (or slipping by).

Sample Management Workflow

6. When a rep provides a sample, how should it be recorded in the system?
   - **Option A (Inventory Tracked):** Treated as a zero-dollar (or cost-value) order that depletes inventory from a specific "Samples" pool? Right now our samples go out of inventory just like they're an invoice to a customer. The rep has a customer record "Rep Name Samples". They input an invoice with a $0.00 value for the samples they pull. This sample goes from our warehouse to the rep. They may use this the same day or they may use it in two months. When they log an activity note against a customer, we want them to have an easy way of selecting the name of the wine they tasted with a customer and an easy way of inputting feedback from that customer. This would allow for the tool to track 1) how many samples were physically pulled by reps (via the reduction in inventory once a delivery to the rep is made) and 2) the sampling data that was entered by the rep about that sample. For example, we could potentially see all customers the rep used a specific sample with and the specific feedback any of the customers samples provided (based on their inputs). If you encourage reps to use that tool, the value that can be derived for supplier feedback and for analyzing sample usage goes up multi-fold. Right now (and this is often the case for wholesalers) all we can see is how many reps pulled samples. The assumption is those samples are being shown either to one customer or many at some point but we have no way of connecting the dots based on rep activity inputs into our system. They may taste 20 customers on that sample or they may taste 0 and drink the bottle at home. We then try to correlate sales to sampling in this very fuzzy data environment but not all samples pulled have the same experience and are used in the same way.
   - **Option B (Expense Log):** Just logged as an activity/expense without tracking specific inventory movement?
7. Do reps have a defined "sample budget" (e.g., $X/month or X cases/month) that the system should track and enforce? Yes, ideally this would be one of the questions about business processes that users could answer. Ours is 60 samples pulled per month with manager approval after that. Some wholesalers are very stingy and others very loose. If the tool could define the value of a sample pulled using real data (as I discussed above), this could fundamentally change the way samples are allocated and allowances are negotiated with suppliers. If we could prove more sampling = x% growth in sales, we could negotiate more favorable sampling terms with our suppliers. Ultimately worth up to several % points in our cost structure.

Strategic Priorities

8. The Client Page will suggest "Top 20 Company Wines" that the customer hasn't ordered yet. How is this "Top 20" list defined? It can be defined one of a number of ways. Perhaps having all three or a toggle where you can select each would be possible?

- Most # of customers purchasing
- Most volume sold
- Most revenue generated (If forced to choose one, this is probably the metric I'd opt for though all three provides better context).

8. How often should this "Top 20" list be refreshed (e.g., monthly, quarterly)? Can it be dynamic based on the past six months sales recalculating at the end of each week? Monthly is too short a timeline and would be overly impacted by seasonality. Quarterly probably the same story.

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Greg Hogue <greg.hogue@gmail.com> Tue, Oct 14, 2025 at 1:44 PM
To: Travis Vernon <travis@wellcraftedbeverage.com>

Wonderful. Thank you!
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