Vendor Expo CRM & Tracking System

Bronte Harbour Classic 5K - Vendor Management

Purpose: Track all vendor leads, applications, approvals, and logistics in one centralized system.

CRM Spreadsheet Structure

Recommended Platform

• **Google Sheets** (recommended for collaboration and real-time updates)

• **Excel** (alternative if preferred)

• **Airtable** (advanced option with better database features)

Sheet 1: Vendor Master List

ColumnDescriptionExample Values**Vendor ID**Unique identifierV001, V002, V003**Business Name**Official business name"Oakville Running Co."**Contact Name**Primary contact person"John Smith"**Email**Primary contact email"john@oakvillerunning.com"**Phone**Primary contact phone"(905) 555-1234"**Website**Business website URL"www.oakvillerunning.com"**Social Media**Instagram/Facebook handles"@oakvillerunning"**Category**Primary vendor category"Health/Fitness/Running"**Subcategory**Specific type"Running Store"**Location**City/Region"Oakville"**Geography Tier**Tier 1, 2, or 3"Tier 1"**Lead Source**How we found them"BIA List", "Facebook Group", "Perplexity Search"**Lead Date**Date first identified"2025-12-15"**Score**Total scoring (0-10)"8"**Tier**Tier 1, 2, 3, or 4"Tier 1"**Outreach Status**Current outreach stage"Not Contacted", "Email Sent", "DM Sent", "Follow-up Sent", "No Response", "Interested", "Not Interested"**Outreach Date**Date of first outreach"2025-12-16"**Response Date**Date vendor responded"2025-12-18"**Application Status**Application stage"Not Applied", "Application Received", "Under Review", "Approved", "Rejected", "Waitlisted"**Application Date**Date application submitted"2025-12-20"**Review Date**Date reviewed by team"2025-12-22"**Approval Date**Date approved/rejected"2025-12-23"**Payment Status**Payment stage"Not Paid", "Payment Link Sent", "Payment Pending", "Paid", "Overdue", "Refunded"**Payment Date**Date payment received"2025-12-25"**Payment Amount**Amount paid"$250"**Booth Number**Assigned booth location"Booth 12"**Booth Location**Physical location description"Near finish line, high traffic"**Insurance Status**Insurance proof received"Not Received", "Received", "Expired"**Insurance Expiry**Insurance expiry date"2026-12-31"**Special Requirements**Power, space, etc."Needs electrical access"**Setup Time**Assigned setup window"7:00-8:00 AM"**Notes**Additional information"Returning vendor from 2025, great experience"**Internal Rating**Quality rating (1-5)"5"**Returning Vendor**Y/N for future years"Y" or "N"

Sheet 2: Outreach Log

ColumnDescription**Date**Date of communication**Vendor ID**Link to Vendor Master List**Business Name**Quick reference**Communication Type**Email, DM, Phone, In-Person**Direction**Outbound or Inbound**Subject/Topic**Brief description**Message Summary**Key points discussed**Next Action**Follow-up required?**Next Action Date**When to follow up**Status**Completed, Pending, No Response

Sheet 3: Application Details

ColumnDescription**Vendor ID**Link to Vendor Master List**Application Date**When submitted**Business Description**Full description from application**Products/Services**What they'll sell/display**Booth Setup Description**Tent, tables, displays planned**Expected Foot Traffic**Their estimate or our projection**Previous Event Experience**List of similar events**Special Requirements**Power, space, accessibility needs**Marketing Materials**Will they have banners, flyers, etc.?**Insurance Provider**Insurance company name**Insurance Policy Number**Policy number**Category Fit Assessment**Reviewer's notes on fit**Screening Score**Detailed scoring breakdown**Reviewer Name**Who reviewed the application**Review Notes**Internal review comments**Approval Rationale**Why approved/rejected

Sheet 4: Booth Assignment Map

ColumnDescription**Booth Number**Booth identifier (Booth 1, Booth 2, etc.)**Location Description**Physical location (e.g., "Near finish line")**Traffic Level**High, Medium, Low**Power Available**Yes/No**Size**10x10 or 10x20**Vendor ID**Assigned vendor**Business Name**Quick reference**Category**Vendor category (for layout planning)**Special Notes**Accessibility, restrictions, etc.

Sheet 5: Payment Tracking

ColumnDescription**Vendor ID**Link to Vendor Master List**Business Name**Quick reference**Approval Date**When approved**Payment Link Sent**Date payment link emailed**Payment Due Date**14 days from approval**Payment Received Date**Actual payment date**Payment Amount**$250 standard**Payment Method**Credit card, e-transfer, cheque**Transaction ID**Payment reference number**Status**Paid, Pending, Overdue, Refunded**Follow-up Actions**Reminders sent, etc.

Sheet 6: Category Balance Tracker

ColumnDescription**Category**Vendor category name**Target Count**Goal number of vendors**Current Applications**Number received**Current Approved**Number approved**Current Paid**Number paid/confirmed**Gap**Target - Current Paid**Priority**High, Medium, Low**Notes**Strategy notes for this category

Sheet 7: Lead Source Performance

ColumnDescription**Lead Source**BIA List, Facebook Group, Perplexity, etc.**Total Leads**Number identified**Contacted**Number reached out to**Responses**Number who responded**Applications**Number who applied**Approved**Number approved**Paid**Number who paid**Conversion Rate**Paid / Total Leads**Quality Score**Average vendor rating**Notes**Observations about this source

CRM Workflow

Stage 1: Lead Identification

1. Add new lead to **Vendor Master List**
1. Fill in basic information (name, contact, category, location)
1. Assign **Vendor ID** (sequential: V001, V002, etc.)
1. Score vendor using scoring model
1. Assign **Tier** (1, 2, 3, or 4)
1. Record **Lead Source**
1. Set **Outreach Status** to "Not Contacted"

Stage 2: Outreach

1. Update **Outreach Status** to "Email Sent" or "DM Sent"
1. Record **Outreach Date**
1. Add entry to **Outreach Log**
1. Set **Next Action Date** for follow-up (if no response in 5-7 days)
1. Update status based on response:
1. "Interested" → Move to application stage
1. "Not Interested" → Mark and move on
1. "No Response" → Schedule follow-up

Stage 3: Application

1. When application received, update **Application Status** to "Application Received"
1. Record **Application Date**
1. Copy application details to **Application Details** sheet
1. Update **Outreach Log** with application receipt
1. Move to review stage

Stage 4: Review & Approval

1. Reviewer fills out **Application Details** sheet with assessment
1. Calculate **Screening Score**
1. Update **Application Status** to "Under Review"
1. Make approval decision:
1. "Approved" → Send approval email with payment link
1. "Rejected" → Send rejection email (keep goodwill)
1. "Waitlisted" → Send waitlist notification
1. Record **Approval Date** and **Reviewer Name**
1. Update **Category Balance Tracker**

Stage 5: Payment

1. Update **Payment Status** to "Payment Link Sent"
1. Record **Payment Due Date** (14 days from approval)
1. Add entry to **Payment Tracking** sheet
1. Monitor for payment:
1. "Paid" → Confirm booth assignment
1. "Overdue" → Send payment reminder
1. Update **Category Balance Tracker** when paid

Stage 6: Booth Assignment

1. Assign **Booth Number** based on:
1. Category mix (spread similar categories)
1. Traffic levels (premium spots for key vendors)
1. Special requirements (power, accessibility)
1. Update **Booth Assignment Map**
1. Send booth assignment confirmation to vendor

Stage 7: Pre-Event

1. Send vendor information pack (setup times, logistics, rules)
1. Confirm insurance received and valid
1. Update **Outreach Log** with all communications
1. Prepare vendor check-in list for race day

Stage 8: Post-Event

1. Send thank you email
1. Request feedback/survey
1. Update **Internal Rating**
1. Mark **Returning Vendor** status
1. Update **Lead Source Performance** with results

Key Metrics to Track

Acquisition Funnel

• **Leads Identified**: Total number of potential vendors found
• **Leads Contacted**: Number reached out to

- **Response Rate**: Responses / Contacts
- **Application Rate**: Applications / Responses
- **Approval Rate**: Approved / Applications
- **Payment Rate**: Paid / Approved
- **Overall Conversion**: Paid / Leads Identified

Category Balance

- **Category Distribution**: Actual vs. target for each category
- **Category Gaps**: Which categories need more vendors
- **Category Quality**: Average rating by category

Source Performance

- **Best Sources**: Which lead sources produce highest quality vendors
- **Source Conversion**: Conversion rate by source
- **Source ROI**: Time invested vs. vendors acquired per source

Timeline Performance

- **Time to Application**: Days from outreach to application
- **Time to Approval**: Days from application to approval
- **Time to Payment**: Days from approval to payment
- **Overall Timeline**: Days from lead identification to confirmed vendor

Automation Opportunities

Google Sheets Automation

- **Conditional Formatting**: Color-code by status (green=paid, yellow=pending, red=overdue)
- **Data Validation**: Dropdown lists for status fields
- **Formulas**: Auto-calculate conversion rates, gaps, timelines
- **Notifications**: Email alerts when payment due dates approach

Integration Opportunities

- **Google Forms**: Link application form directly to CRM
- **Email Integration**: Connect to Gmail for automated logging
- **Payment Processing**: Link to payment system for automatic status updates

- **Calendar Integration**: Auto-create follow-up reminders

Access & Permissions

Recommended Access Levels

- **Full Access**: Vendor Expo Coordinator, Project Manager
- **View Only**: Committee members, race directors
- **Edit Specific Sheets**: Outreach team (Outreach Log only), Reviewers (Application Details only)

Data Backup

- **Daily Backups**: Automated Google Sheets version history
- **Weekly Exports**: Download CSV backups
- **Monthly Archives**: Full system snapshot

Notes

- **Keep it Simple**: Start with basic structure, add complexity only if needed
- **Regular Updates**: Update CRM daily during active outreach periods
- **Data Quality**: Ensure consistent data entry (use dropdowns, validation)
- **Privacy**: Protect vendor contact information, follow privacy regulations
- **Scalability**: Structure allows for growth to 100+ vendors if needed

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