Vendor Management Complete Workflow

End-to-End Process from Application to Event Day

Purpose: Complete operational guide for managing the vendor expo from application intake through event day execution.

Overview: Complete Vendor Journey

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Lead Identification → Outreach → Application → Review → Approval →
Payment → Booth Assignment → Pre-Event → Event Day → Post-Event
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Stage 1: Application Intake

Step 1.1: Application Received

Trigger: Vendor submits online application form

Automatic Actions:
1. Application data flows to CRM "Application Details" sheet
2. Auto-acknowledgment email sent to applicant
3. Notification sent to Vendor Expo Coordinator

Manual Actions:
1. Review application for completeness
2. Check for obvious exclusion issues (cannabis, tobacco, etc.)
3. Assign Vendor ID if not already in system
4. Update CRM:
- Application Status: "Application Received"
- Application Date: Today's date
- Add to Application Details sheet

Timeline: Within 24 hours of submission

Stage 2: Application Review

Step 2.1: Initial Exclusion Check (Day 1-2)

Review Checklist:
- [ ] Not in hard exclusion list (cannabis, tobacco, MLM, political, etc.)
- [ ] Not direct competitor to confirmed sponsor
- [ ] Business appears legitimate (website active, recent activity)

- [ ] Application is complete (all required fields filled)

Decision:
- **If FAIL**: Reject immediately, send rejection email
- **If PASS**: Move to detailed review

CRM Update:
- Application Status: "Under Review" (if passing)
- Application Status: "Rejected" (if failing)
- Add review notes

Step 2.2: Detailed Scoring (Day 3-5)

Apply Screening Rubric:

0: Broader GTA

Brand Fit Score (0-3 points):

0: Poor alignment

Visual/Professional Score (0-2 points):

0: Unclear presentation, no experience

Uniqueness Score (0-2 points):

0: Duplicate of existing vendors

Category Balance (+1/-1):

1. **Geography Score** (0-3 points):
1. 3: Oakville/Bronte
1. 2: Halton Region
1. 1: GTA West/Central
1. 3: Perfect alignment (running/fitness, family services, local food)
1. 2: Good alignment (wellness, local retail, community orgs)
1. 1: Acceptable alignment (professional services, tech with fitness angle)
1. 2: Strong visual presence, professional materials, event experience
1. 1: Adequate presentation, some experience
1. 2: Unique category or offering
1. 1: Some differentiation
1. +1: Fills gap in underrepresented category
1. 0: Category at target level
1. -1: Category overrepresented

Calculate Total Score: Sum of all scores (0-11 points)

CRM Update:
- Record all scores in Application Details sheet
- Calculate and record Total Score
- Add scoring notes

Step 2.3: Category Balance Check

Review Current Status:
- Count approved vendors by category
- Compare to target numbers
- Check if this category has space

Decision:
- **If Category at Cap**: Consider waitlist
- **If Category Underrepresented**: Favor approval
- **If Category Balanced**: Normal approval process

CRM Update:
- Update Category Balance Tracker
- Note category status in review

Step 2.4: Insurance & Compliance Check

Verify:
- [ ] Business insurance provided (if required)
- [ ] Insurance valid through June 21, 2026
- [ ] Food permits provided (if food vendor)
- [ ] Professional business registration (if applicable)

Action:
- **If Missing**: Request documentation before approval
- **If Complete**: Proceed with decision

Stage 3: Approval Decision

Step 3.1: Make Decision (Day 6-7)

Based on Total Score:

Tier 1 (8-11 points): Immediate Approval
- Approve immediately
- High priority for booth assignment
- Fast-track process

Tier 2 (6-7 points): Standard Approval
- Approve if category balance allows
- Standard booth assignment
- Normal process

Tier 3 (4-5 points): Conditional Approval
- Approve only if needed to reach 50+ target
- Standard or lower-traffic booth
- Fill gaps if needed

Tier 4 (0-3 points): Rejection
- Reject with explanation
- Keep goodwill for future

Special Case: Waitlist
- High-quality vendor but category at cap
- Place on waitlist
- Contact if space opens

Step 3.2: Document Decision

CRM Update:
- Application Status: "Approved", "Rejected", or "Waitlisted"
- Approval Date: Today's date
- Reviewer Name: Who made decision
- Decision Rationale: Brief notes on why

Step 3.3: Send Notification

If Approved:
- Send approval email with payment link
- Include payment deadline (14 days)
- Provide next steps information

If Rejected:
- Send polite rejection email
- Keep goodwill for future
- Brief explanation (if appropriate)

If Waitlisted:
- Send waitlist notification
- Explain status and timeline
- Keep relationship positive

CRM Update:
- Record notification sent
- Update Outreach Log

Stage 4: Payment Processing

Step 4.1: Payment Link Sent

Action: Payment link included in approval email

CRM Update:
- Payment Status: "Payment Link Sent"
- Payment Due Date: 14 days from approval
- Add to Payment Tracking sheet

Step 4.2: Monitor Payment Status

Daily Check:
- Review payment tracking
- Identify payments received
- Identify payments overdue

CRM Update:
- Update Payment Status when payment received
- Record Payment Date
- Record Payment Amount
- Record Transaction ID

Step 4.3: Payment Reminders

If Payment Overdue (after 14 days):
- Send payment reminder email
- Give additional 3-5 days
- Follow up by phone if still no payment

If Payment Not Received (after extended deadline):
- Contact vendor to confirm interest
- May release booth if no response
- Update status accordingly

Step 4.4: Payment Confirmation

When Payment Received:
- Send payment confirmation email
- Confirm booth assignment timeline
- Provide next steps

CRM Update:
- Payment Status: "Paid"
- Payment Date: Recorded
- Ready for booth assignment

Stage 5: Booth Assignment

Step 5.1: Create Booth Map

Booth Layout Planning:
- Design expo area layout

- Assign booth numbers (Booth 1, Booth 2, etc.)
- Identify high-traffic areas
- Note power availability (if applicable)
- Note accessibility needs

CRM Update:
- Create/update Booth Assignment Map sheet
- Record all booth numbers and locations

Step 5.2: Assign Booths

Assignment Criteria:
1. **Category Mix**: Spread similar categories throughout expo
2. **Traffic Levels**: Premium spots for key vendors (sponsors, high-value)
3. **Special Requirements**: Power, accessibility, space needs
4. **Vendor Preferences**: Consider requests if reasonable

Assignment Process:
1. Review paid vendors
2. Sort by category
3. Assign booths based on criteria
4. Document assignments

CRM Update:
- Booth Number: Assigned
- Booth Location: Description
- Traffic Level: High/Medium/Low
- Special Notes: Any considerations

Step 5.3: Send Booth Assignment

Communication:
- Send booth assignment email
- Include booth number and location description
- Provide setup instructions
- Include expo map (if available)

CRM Update:
- Record assignment sent
- Update Outreach Log

Stage 6: Pre-Event Preparation

Step 6.1: Vendor Information Pack (2-3 Weeks Before Event)

Send Comprehensive Information:
- Event day schedule
- Setup and teardown times
- Parking information

- Vendor check-in location
- Booth assignment confirmation
- Rules and regulations
- Contact information for event day
- Emergency procedures

CRM Update:
- Record information pack sent
- Update Outreach Log

Step 6.2: Insurance Verification (1-2 Weeks Before Event)

Verify:
- [ ] Insurance certificates received
- [ ] Insurance valid through June 21, 2026
- [ ] Food permits received (if food vendor)

Action:
- Follow up if missing
- Document in CRM

Step 6.3: Final Confirmation (1 Week Before Event)

Send Final Reminder:
- Confirm attendance
- Remind of setup time
- Provide any last-minute updates
- Answer any questions

CRM Update:
- Record final confirmation sent
- Update Outreach Log

Step 6.4: Vendor Check-In List

Prepare for Event Day:
- Create check-in list with all vendors
- Include booth numbers
- Include contact information
- Print copies for check-in tent

Stage 7: Event Day Execution

Step 7.1: Vendor Check-In (7:00-8:00 AM)

Process:
1. Vendors arrive at check-in tent

2. Verify vendor identity
3. Confirm booth assignment
4. Provide setup instructions
5. Answer questions
6. Direct to booth location

Documentation:
- Mark vendors as checked in
- Note any issues or concerns
- Record setup completion

Step 7.2: Setup Support (7:00-8:00 AM)

Support Activities:
- Assist with booth location finding
- Help with setup if needed
- Address any issues
- Ensure all vendors ready by 8:00 AM

Step 7.3: Event Day Monitoring (8:00 AM - 3:00 PM)

Ongoing Support:
- Check in with vendors periodically
- Address any issues that arise
- Ensure compliance with rules
- Maintain positive vendor experience

Documentation:
- Note any issues
- Record vendor feedback
- Document any problems

Step 7.4: Teardown Support (3:00 PM - 4:00 PM)

Support Activities:
- Ensure orderly teardown
- Assist if needed
- Verify area cleanup
- Thank vendors for participation

Stage 8: Post-Event Follow-Up

Step 8.1: Thank You Communication (Within 1 Week)

Send Thank You Email:
- Thank vendors for participation
- Request feedback via survey
- Share event photos (when available)

- Invite for next year

CRM Update:
- Record thank you sent
- Update Outreach Log

Step 8.2: Feedback Collection

Send Survey:
- Vendor experience rating
- What worked well
- What could be improved
- Likelihood to return
- Suggestions for next year

CRM Update:
- Record feedback received
- Update Internal Rating
- Note key feedback points

Step 8.3: Relationship Management

For High-Quality Vendors:
- Personal thank you (phone call or in-person)
- Priority consideration for next year
- Referral requests (if appropriate)

CRM Update:
- Mark Returning Vendor: "Y" or "N"
- Update Internal Rating
- Note relationship status

Step 8.4: Analysis & Improvement

Review Metrics:
- Vendor acquisition funnel (leads → paid)
- Category balance achieved
- Source performance (which sources best)
- Vendor satisfaction scores
- Return rate

Document Learnings:
- What worked well
- What needs improvement
- Process refinements for next year
- Update all documentation

Key Performance Indicators (KPIs)

Acquisition Metrics

- **Total Leads Identified**: [Number]
- **Leads Contacted**: [Number]
- **Response Rate**: [Percentage]
- **Application Rate**: [Percentage]
- **Approval Rate**: [Percentage]
- **Payment Rate**: [Percentage]
- **Overall Conversion**: [Percentage]

Quality Metrics

- **Average Vendor Score**: [Number]
- **Category Balance**: [Distribution]
- **Geographic Distribution**: [Tier breakdown]
- **Vendor Satisfaction**: [Average rating]

Operational Metrics

- **Time to Application**: [Average days]
- **Time to Approval**: [Average days]
- **Time to Payment**: [Average days]
- **Event Day Check-In Rate**: [Percentage]

CRM Maintenance

Daily Tasks

- Update application statuses
- Log all communications
- Monitor payment status
- Respond to vendor questions

Weekly Tasks

- Review category balance
- Check payment deadlines
- Update outreach statuses
- Review metrics

Monthly Tasks

• Analyze source performance
• Review vendor quality
• Update processes based on learnings
• Plan next outreach wave

Troubleshooting Common Issues

Issue: Low Application Rate

Solution: Review outreach messaging, improve value proposition, simplify application process

Issue: Low Payment Rate

Solution: Improve payment process, send reminders, offer payment plans if needed

Issue: Category Imbalance

Solution: Adjust outreach to target underrepresented categories, adjust approval criteria

Issue: Vendor No-Shows

Solution: Improve confirmation process, send multiple reminders, have waitlist ready

Issue: Event Day Problems

Solution: Have support team available, clear communication, quick problem resolution

Documentation & Records

Maintain These Records

• All vendor applications
• All communications (emails, calls, DMs)
• Payment records
• Booth assignments

• Event day issues

• Post-event feedback

Retention Policy

• Keep records for 1 year minimum

• Archive after event completion

• Maintain for future year planning

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