



# Phone Sales 101

Tracking and Managing Phone Sales in OrderPort

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**A practical guide to setting up, tracking, and growing your phone sales program.**

### Where: Choose How You'll Track Sales

*Before you start dialing, decide how you'll measure your team's work. There's no wrong choice—but there is a smart one for your setup.*

#### Option 1: Phone Sales POS Location (Recommended)

*This is the most powerful and user-friendly tracking method.*

##### **Why it works:**

- Gives you full customer visibility—recent purchases, favorite items, cards on file, club info—all on one screen.
- Your tasting room staff already knows this interface, so no need to train them in Admin or change permissions.
- Staff can create shipping orders, update club details, and add account notes right from their familiar POS app.
- Logging into a dedicated Phone Sales POS Location lets you track results by location and staff—your dashboards will instantly show campaign performance.

Pro Tip: OrderPort can provide this extra POS location free of charge.

#### Option 2: Use the Admin Cart

*If your phone-sales team doesn't normally use POS, the Admin Cart is a simple alternative.*

- Orders can be placed directly in Admin while referencing customer profiles in POS for visibility.
- Great for teams working from a computer who still want fast access to customer details.

#### Option 3: Dedicated Employee Login

*This works but isn't ideal.*

- Tracks by user but adds more employee tracking work.
- Best if you don't have more than one team member doing phone sales.
- If you have multiple team members you'd need a secondary profile for each which is not ideal.

**Bottom Line: If you can't track it, you can't improve it. Knowing where your revenue comes from is the key to refining your approach.**

## What: Decide What to Offer

*Once you've chosen your tracking method, decide what you'll sell.*

- Build curated collections with discount rules so pricing adjusts automatically.
- Review inventory: move what's slow, spotlight what's seasonal, and highlight what fits.
- Stay authentic: Promote events or upcoming releases, Share stories that feel personal, Have a famous family prime-rib rub? Pair it with a Syrah and call members to ask what they're cooking for the holidays.

**Pro Tip: The more genuine the outreach, the better it performs.**

## Who: Build Your List

*Time to find your audience.*

- Marketing 2.0 List Builder is your best friend.
- Segment by purchase history, varietal preference, club tenure, location, or total spend.
- Stack filters using AND/OR logic for precision targeting.
- Export lists: phone numbers included for easy dialing.
- Using RedChirp? Even better: your call list doubles as a text-follow-up list.

**Pro Tip: Bulk marketing is irrelevant marketing. Make it personal so your customers feel known, not targeted.**

## When: Timing Is Everything

*Call when customers are most open to conversation.*

- Afternoons: They're winding down and thinking about dinner.
- Weekends: Great time for relaxed, friendly chats.
- Midday: Ideal for a quick lunch-break touchpoint.
- Avoid early mornings. Nobody's ready to buy Pinot at 9 a.m. (yet).
- Voicemails Are Okay!

**Here's a sample:** "Hi [First Name], this is [Your Name] from [Winery]. We're reaching out to wish you a happy holiday season and share some special offers on your favorite wines. I'd love to tell you more! Give us a call at [Phone Number] or email [Email Address]. Cheers!"

## How: Train Your Team

*Training builds confidence, and confidence drives results.*

- Host a tasting of the wines you'll feature so staff can speak authentically.
- Review tech sheets and talking points.
- Role-play a few call scenarios before launching.
- Identify your social butterflies: the natural connectors who just get your members.
- Remind everyone that the goal isn't perfection; it's genuine connection.

**It's just like pouring wine for them in the tasting room; only now the glass is theirs.**

## Why: Measure What Matters

*Tracking = insight = improvement.*

Monitor metrics like:

- Total sales from phone outreach
- Average order value
- Conversion rate per rep
- Revenue by product or campaign

**These numbers tell you what's working, where to adjust, and who's crushing it. Recognize success, refine strategy, repeat. If you can't track it, you can't grow it.**

## Bonus: Motivate Your Team

*Don't be afraid to sweeten the deal. Incentives spark consistency and excitement.*

Common Incentives:

- % of Sales: A simple commission keeps reps engaged.
- Gift Cards: Easy, flexible, and motivating.
- Wine Perks: Milestone bottles or case bonuses.
- Top Rep Rewards: Two nights in the guest house, special event invites, or winemaker dinners.
- Extra PTO Days: For seasonal or quarterly goals.

**Rewards = Effort. That's sales for ya! A motivated team turns every call into a conversation worth having.**

## Quick Phone Tips for Successful Outreach

### Chat!

- Ask about their day, what wines they've been opening lately, or how they're celebrating the season.
- This is a relationship-building call, not just a revenue call.

### Review Their Account

- Before you call, look at their profile.
- Do they have an unshipped order? Offer to ship it.
- Are they a few bottles short of a case?
- "If we round this out to a case with our sale wines, I can offer free shipping!"

### They Say No, That's Okay

- Not every call will end in a sale—and that's fine.
- Share what's new or coming soon: new releases, events, winemaker dinners.
- End on a friendly note: "No worries at all! I just wanted to wish you a happy holiday season and thank you for being part of our club."

### Take Notes

- Add quick notes in their account—trips, favorites, anniversaries, anything personal.
- These small details help your team build long-term connections.

### Follow Up with a Personal Touch

- Send a holiday card or note referencing something from your call. "It was so nice chatting about your upcoming trip—enjoy France and a glass for us!"
- Slip it into their next shipment or mail it separately.

## Bottom Line

**Be genuine, be curious, and treat every call like it's with a friend who just happens to love your wine.**