



OrderPort Master Class Take-Home Guide

Tracking and Managing Phone Sales in OrderPort

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.



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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 your brand story.
- 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).

Vocemails 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. Start your pilot there.
- 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 on their end.

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

1. Chat!

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

2. Review Their Account

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

3. They Say No, That's Okay

- a. Not every call will end in a sale—and that's fine.
- b. Share what's new or coming soon: new releases, events, winemaker dinners.
- c. 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."

4. Take Notes

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

5. Follow Up with a Personal Touch

- a. 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!"
- b. 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.

