



SevenFifty

Advanced Skill Adoption Plan

Week 1 Verification Requests

Connect with your buyers

- Store buyer contact information in SevenFifty
- Invite new buyers to the site
- Make it easier for buyers to send you messages and orders by ensuring your contact information appears on their access

Week 2 List Tab Best Practices

Buyer Facing-Using Shared Links;

- Brand Lists
- Sharing cocktail Recipes
- Seasonal top picks
- Newsletter style promotion

Consumer/Non Purchasing Trade

- In Store Tasting sheets with Event Pricing in Price Quotes
- Wine Dinner Order Forms with Event Pricing in Price Quotes
- Staff Training Packets

Product Knowledge

- Sharing Product Lists internally
- Stuff

Week 3 Account Detail Page Notes

Store buyer information details

- birthdate
- hometown
- conversational details

Tasting Appointment Habits

- Open Call
- By Appointment
- Pro Supplier Visit

Week 4 Tagging Accounts

When making Sample Sheets

- Tagging accounts ensures that you create a record of your tasting at the account
- This powers part of the Sample to Sales Report
- Its also the pre step to sharing Digital Sample Sheets

Week 5 Share Digital Sample Sheets

These Digital Sample Sheets give buyers

- A record of your interaction
- A place to keep notes about the products
- An order widget for each product for buyers to convert sample sheets to orders
- Those orders come to you as an inbound draft in the Orders Tab

Week 6 Recording Reactions

Recording digital reactions your sampling activities means

- You can remember all the nuanced comments your buyers
- Keep an ongoing record of your tastings with buyers on their Account Detail Pages
- There is an exportable Sample History report that becomes manipulatable in Excel

Week 7 Reminders

You can make reminders from

- Recording Buyer Reactions
- The Account Detail Page
- The Home Page

Reminders send an email to your inbox the morning of the day the reminder is set with the details you have noted