Measure the Work, *Not* Just the Cases.

A FIELD SALES EFFECTIVENESS FRAMEWORK FOR SPIRITS, WINE & CONSUMER BRANDS

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> *Most brands judge field reps on cases shipped. By the time that number moves, the quarter is gone. We track what reps control every week, tie it to account-level depletions, and learn within a month which activities move product and which only fill a calendar.*

01 THE CHAIN WE MEASURE

i

Effort

What the rep did: calls, buyer tastings, staff training, sampling.

SOURCE · REP LOG

ii

Wins

What the account did: placements, menus, features, displays.

SOURCE · REP LOG + PHOTO

iii

Depletions

Cases sold from the distributor to each account.

SOURCE · DISTRIBUTOR DATA

iv

Shipments

Cases the brand ships to the distributor.

SOURCE · PO LOG

CORRELATE TO DEPLETIONS, NOT SHIPMENTS

Shipments follow the distributor's inventory and ordering cycle. One purchase order can land in a single week and reflect months of selling, or none. Depletions move account by account, which is where reps work. Shipments stay the result the business reports. Depletions are the link that makes the analysis possible.

02 DESIGN PRINCIPLES

Proof or it didn't happen.

A photo, a menu, an order. Every win carries evidence.

One account per entry.

Account names match the distributor's data, so activity and depletions join cleanly.

Effort and wins apart.

A tasting is something the rep did. A menu listing is something the account did.

Short beats complete.

If a field never changes a decision, it goes.

One system.

We build on the tracker your team already uses, not a second form.

Weekly, by Friday.

One cadence for every rep. Late entries count the following week.

03 ON-PREMISE DRIVERS

ACTIVITY	TYPE	COUNTS WHEN	PROOF	WHY IT MATTERS
Qualified call	EFFORT	The rep meets someone who can buy: bar manager, beverage director or owner. A drop-in with no buyer doesn't count.	Contact name	Top of the funnel
Buyer tasting	EFFORT	The buyer tastes at least one product, with pricing and the pitch.	Products poured	Earliest predictor of a first order
Staff training	EFFORT	A session with the bar team on the brand, the liquid and the serve.	Number trained	Drives handsell and reorders
Consumer sampling	EFFORT	A brand-hosted tasting or activation in the account.	Guests, bottles used	Trial and velocity
New placement	WIN	First order placed.	Distributor order	Distribution
Menu placement	WIN	The brand is named on the printed or digital menu, on the spirits list or in a cocktail.	Menu photo	Lasting visibility
Drink feature	WIN	A time-bound push: a special, a limited cocktail, a bartender's pick or a staff incentive.	Photo, start and end dates	Short-term spike
Back-bar visibility	WIN	The bottle sits front-facing on the back bar.	Photo	Low cost, worth noting
Reorder	WIN	Second and later orders.	Distributor order	Proof the liquid moves

> **Menus and features are tracked separately.** A menu listing is durable and survives staff turnover. A feature is a spike with an end date. They produce different depletion curves, and you only see that if you track them apart.

04 OFF-PREMISE DRIVERS

ACTIVITY	TYPE	COUNTS WHEN	PROOF	WHY IT MATTERS
Qualified call	EFFORT	The rep meets the owner, buyer or category manager.	Contact name	Top of the funnel
Buyer tasting	EFFORT	The buyer tastes, with pricing and the pitch.	Products poured	Predicts authorization
Staff education	EFFORT	Floor staff are trained to handsell.	Number trained	Premium products sell on recommendation
In-store tasting	EFFORT	A consumer tasting in store, where state law and the retailer allow it.	Consumers, bottles	Trial at the shelf
New authorization	WIN	The product is listed and the first order placed.	Distributor order	Distribution
Shelf placement	WIN	Eye level or in the premium set. Facings noted.	Photo	Findability
Secondary display	WIN	Locked case, glorifier, endcap or feature table.	Photo	The biggest in-store lever
Point of sale	WIN	Shelf talker, tasting card or neck hanger, within the rules.	Photo	Explains the price
Retailer feature	WIN	Newsletter, email, social post or staff pick.	Screenshot	Reach beyond the aisle
Reorder	WIN	Second and later orders.	Distributor order	Proof of sell-through

> **Compliance comes first.** Tied-house laws limit what a supplier can give a retailer: samples, the value of point-of-sale material, event support. We confirm the rules in each state before reps sample, place materials or fund events.

05 WHAT EVERY ENTRY CAPTURES

DATE & REP	ACCOUNT	CHANNEL & STATUS
Week ending Friday	Exact distributor account name	On or off-premise; prospect, new or existing
ACTIVITY	**PRODUCT**	**QUANTITY**
From the lists above. No free text.	Each product involved	Bottles, staff, guests or facings
PROOF	**OPENED BY**	**NEXT STEP**
Photo, menu or order link	Brand team or distributor team	What happens next, and when

06 SETTING TARGETS

Case goal = new accounts × opening order + active accounts × reorder rate × months

We work backward from the case goal to new accounts a week, then use the team's own conversion rates to get placements, tastings and calls. Illustration: two reps opening three accounts a week each, at a one-case opening order and half a case a month in reorders, reach roughly 120 cases in thirteen weeks. Every input is a placeholder until four weeks of your data replace it.

07 READING THE DATA

The unit is the account-week: for every account and every week, the activities logged, the wins and the depletions. We allow for lag, reading depletions over the four weeks after an activity and eight weeks after a menu placement. Then four reads, in order of usefulness:

i

Conversion

Share of buyer tastings that become a placement within 30 days, by rep, channel and product.

ii

Lift

Monthly cases per account with and without a menu listing, a feature, a display or staff training.

iii

Reorder

Share of new placements that reorder within 30 and 60 days, split by whether staff were trained.

iv

Efficiency

Depletion cases per ten qualified calls, by rep.

> **READ IT HONESTLY**
>
> A small team over one quarter supports directional comparisons, not statistical proof. We re-read monthly and never move targets on one week's data. Correlation isn't cause: reps pitch menus to their best accounts, so those accounts may outperform for reasons the menu didn't create. We compare like accounts with like.

08 HOW WE PUT IT IN PLACE

Define

WEEK 1

Map the activities to your channels and accounts, set definitions and proof rules, and fit the fields into your existing tracker.

Baseline

WEEKS 2–4

Reps log every week. A ten-minute weekly scorecard: activity against target, wins with proof, depletions against plan.

Read & Reallocate

MONTH 2 ONWARD

A monthly read on conversion, lift, reorder and efficiency. Targets reset on real ratios, and rep time moves to what works.

09 THE OPERATING CADENCE

WEEKLY · 10 MINUTES

A one-page scorecard per rep: activity against target, wins with proof, new accounts, and depletions for the week and to date against plan.

One question every week: what converted best last month, and are we spending time there?

MONTHLY · FIRST WEEK

The four reads: conversion, lift, reorder and efficiency. Targets reset on real ratios, and rep time moves toward the activities that move cases.

Decisions are written down, so next month's read can test them.

10 WHO DOES WHAT

ROLE	RESPONSIBILITY
Sales lead	Owns the tracker and rep compliance. Sets weekly targets with Aperture.
Field reps	Log every activity and win by Friday, with proof.
Aperture	Builds the definitions, the weekly scorecard and the monthly read from the tracker and distributor data. Recommends where rep time goes.
Leadership	Reviews the monthly read and makes the allocation calls.

11 WHAT YOU GET

A shared definition of work.

Every rep counts the same activity the same way, in every market.

An early warning.

A weak funnel shows in week three, not at the end of the quarter.

Evidence for the next dollar.

Proof of which activities earn more rep time, sampling budget or headcount.

Let's talk about your *field team*.

Let's expand your aperture.

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