

So You're Self-Distributing. Now What?

Logistics, sales, marketing, and tech to run it like a pro, not a scramble

BEER WORTH FINDING
VERMONT CRAFT BREWERS CONFERENCE
VERMONT BREWERS ASSOCIATION

Questions?











HI! I'M JULIE

not your hobby
MARKETING SOLUTIONS

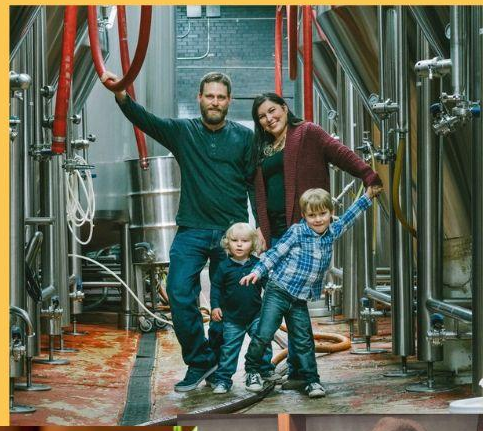
KICK FIZZ

20+ years in the beverage trenches. Former sales rep turned strategist for the independent brands that actually make this industry interesting. **I teach brands how to work smarter, not harder.** I also have a podcast!

Named 2023 Brewers Association Mentor of the Year, I sit on the Biz Development Committee and belong to a bunch of state trade guilds. Also a business journalist, university instructor, sci-fi nerd, ex-billiards shark, and a lover of donuts.

Married a beer delivery guy who became a sales rep, then a head brewer, then a packaging manager, then a canning line fabricator, and now... my CFO. We've got two teenagers who (for now) still like us and won't wreck your taproom.

We live in Broomfield, Colorado—close enough to the mountains for skiing, but far enough from Denver to not have to watch the Rockies lose in person too often.







Congrats, You're the Distributor Now

Every one of these is a full-time job at a distributor. At your place, it's somebody's Tuesday.

- Selling
- Taking orders
- Picking orders & routing
- Deliveries
- Invoicing and getting paid
- Merchandising
- Servicing accounts
- Marketing that moves product
- Tracking all of it

Put a name next to each job. These things must be delegated and it might just be YOU.

The job description came with the van.

STARTER KIT: READY CHECK TAB (PUT A NAME NEXT TO EACH JOB)





Build Your Backyard First

1. The oldest line in wholesale: build your backyard before you build anything else
2. Conquer the bunny slope before you go out over your skis
3. Small fish, small pond: draw a tight circle around the brewery and fill it before you widen it
4. Density beats distance: eight accounts on one road beat eight accounts in eight towns
5. Start with the accounts your regulars already go to. Ask them where else they drink and shop.

Bunny slope first. The black diamonds will still be there in spring. Don't get out over your skis.

STARTER KIT: ROUTE PLANNER (ZONES) AND ACCOUNT TRACKER (YOUR TARGET LIST)



SECTION 1 · MAKE SURE YOU'RE READY

The Ready Check

Equipment A vehicle you can load alone, insured for delivery · hand truck, ramp, straps · cold storage · kegs in the field, in the wash, and full

People Named owners for selling, delivering, invoicing, and the 7 AM "we're out of your IPA" call

Paperwork Current licenses · commercial auto and liability insurance · price list · sell sheet · invoice template · return policy

Process Delivery days, an order cutoff, and ONE way orders come in (not text, DM, email, and a napkin)

Systems Accounting that sends invoices · a CRM from day one · a shared delivery calendar

What good looks like You take an order, deliver it, invoice it, and get paid without anyone asking "wait, who's handling this?"

Low overhead is your margin. Borrow, lease, or buy used before you buy new.

Tech: QuickBooks Online or Xero for invoicing · HubSpot's free CRM for accounts

STARTER KIT: READY CHECK TAB

SECTION 1 · MAKE SURE YOU'RE READY

Communication With Your Team

- **Sales and production talk every week.** They know your role, and you know theirs.
- **Sync on:** release dates, production timelines, packaging runs, and inventory on hand
- **Know what's coming** so you can promote it to accounts before it lands
- **Never overpromise and underdeliver.** If production can't make it, don't sell it.
- **One shared calendar** for brew dates, packaging, releases, and deliveries

You can't sell out of an empty basket.

STARTER KIT: READY CHECK TAB (SHARED CALENDAR, NAMED OWNERS)

SECTION 1 · MAKE SURE YOU'RE READY

Speak Wholesale

The words buyers and accounts use

Account / buyer:	the business, and the one person there who can say yes
Placement (POD):	one SKU at one account. Two SKUs at one bar = two placements.
Sell-in / sell-through:	getting it in the door / getting it out the other side
Velocity:	how fast it moves once it's there
Reorder:	the actual sale. The first order is a test drive.
Permanent handle vs. rotator:	a tap that's yours vs. a tap you're borrowing for one keg
Facings / cooler door:	how much shelf you get, and whether it's cold

SECTION 1 · MAKE SURE YOU'RE READY

Speak Wholesale, Part 2

Frontline price:	your one price for every account
Case equivalent (CE):	24 × 12 oz, so you can compare kegs to 4-packs
Sixtel / half:	1/6 bbl and 1/2 bbl kegs
Drop / minimum / cutoff:	what you leave per stop, the smallest order you'll deliver, the deadline to make the next truck
Out of code / rotation:	past its date / oldest product to the front
The ask:	exactly what you want from this visit
Trade spend:	what you spend helping product sell at accounts

Buyers can tell who's new by the third sentence.

STARTER KIT: SPEAK WHOLESALE TAB (FULL GLOSSARY + CE CONVERTER)

SECTION 1 · MAKE SURE YOU'RE READY

Trade Practice Ground Rules

These show up in some form in almost every state.

- **You can't buy a placement.** No paying for taps, shelf space, menu spots, or "listing fees."
- **No freebies.** Free beer, cash, equipment, or services to win or keep an account is an inducement.
- **Same price, every account.** No sweetheart deals, no "buy ten, get one."
- **Get paid on delivery.** That's the rule in Vermont, so build your cash flow around it.
- **Returns need a real reason.** Out of code, damaged, misordered. No "we'll take back whatever doesn't sell."
- **Branded items have limits.** Glassware, tap handles, and signs get checked before they leave the brewery.

If you'd be nervous explaining it to your regulator, keep it off the invoice.

Federal TTB rules plus your state's version. Vermont specifics: ask the VBA. Not legal advice.

SECTION 2 · ROUTES & LOGISTICS

Routes That Don't Eat Your Week

- **Equipment** Hand truck, ramp, straps · PPE: gloves, steel-toe boots, and a back you'd like to keep · insulated blankets or reefer space · phone mount · room for empties
- **People** You, a part-time driver, or your rep doing double duty. When driving eats selling time, split the jobs.
- **Paperwork** Ordering software instead of paper if you can pull it off · invoices, keg log, return forms · paper backup in the cab for dead zones
- **Process** Map accounts → zones by drive time → one delivery day per zone → order cutoff → load list → empties ride home
- **Systems** Orders landing in one place · keg tracking sheet · weekly route calendar
- **What good looks like** Full van, no backtracking, every zone on its day, nothing rides in the van overnight

Tech: Google Maps for short runs · Routific or Badger Maps when the stops pile up

AI: paste the week's orders into ChatGPT, Claude, or Gemini, have it sequence stops by zone, then sanity-check it against the map

STARTER KIT: ROUTE PLANNER TAB





SECTION 3 · THE FOUR P'S

Product

- Don't flood the market with a million SKUs. Your buyer has six taps and one cooler door.
- Find the overlap of most profitable and most popular. It has to be a balance.
- Lead with the 2–4 SKUs that pay rent. The weird stuff keeps the taproom interesting.
- Formats that fit the account: sixtels and halves for bars, cans for stores
- Date codes a buyer can read without a decoder ring

The beer everyone loves and the beer that pays the bills should be on speaking terms.

STARTER KIT: MARKET SURVEY TAB

SECTION 3 · THE FOUR P'S

Price

1. Run a market survey before you land on a price: walk the shelves, check tap lists at the accounts you want, and write down what comparable brands charge
2. Build the ladder backward: shelf or tap price in your market → retailer margin → your frontline price → your cost
3. One printed price list, same for every account
4. Taproom pays you the best margin. Wholesale pays you in reach. Know what each case is worth to you.

Trade spend: 1–2% of wholesale revenue

Demos, promotions, samples, and related expenses. POS and other materials come out of your brand advertising budget.

Tech: AI double-checks the math (then you check it again)

STARTER KIT: MARKET SURVEY AND PRICING GRID TABS

Position

- **Know where you fit:** which accounts, which shelf, which tap neighborhood (local section, IPA set, lager row)
- **Find the gaps you can fill:** the style nobody nearby is pouring, the town nobody's servicing, the format nobody offers
- Know your price tier (value, mid, premium) and the customer budget that goes with it
- Your three uniques in one sentence a busy buyer can repeat to their staff
- **Chains:** you're probably not ready yet. Independents first. Chains want volume, consistency, and sales history you're still building. (Bunny slope.)

STARTER KIT: MARKET SURVEY TAB

SECTION 3 · THE FOUR P'S

Promotion

Account-level: tastings, tap takeovers, brewer nights, staff education

B2B marketing: buyer emails and texts

Product finder on your website, plus digital advertising that sends people to it

Everything on a calendar, with demos and promos paid from trade spend

What good looks like: a buyer can say yes in under five minutes because everything they need fits on one page

Tools: spreadsheets (lots of them) · brand deck · sales sheet · price list · menu cards · shelf talkers · posters · Canva to make all of it

⚠️ Shelf talkers, posters, and other POS fall under the branded-items rule.

STARTER KIT: SALES MATERIALS AND MARKETING CHECKLIST TABS

SECTION 4 · SELLING

The Job: What a Sales Rep Actually Does

- **Prospect:** build the target list, research accounts, book appointments
- **Sell in:** pitch, taste, make the ask, close
- **Follow up:** within 48 hours, every time, even when the answer was no
- **Service:** rotate, pull out-of-code, check draft quality, train staff
- **Take orders and chase reorders:** before they run out, not after
- **Report back:** log every visit, flag problems, bring home what you heard about the market

Pouring samples is the fun part. Follow-up is the job.

STARTER KIT: ACCOUNT TRACKER AND VISIT LOG TABS



A Sales Week That Works

- **Monday:** CRM review, plan the week, book appointments, confirm deliveries
- **Tuesday to Thursday:** field days for sell-in visits, service stops, staff trainings, and tastings
- **Friday:** follow-ups, reorder calls, CRM cleanup, next week's target list
- **Visit split:** 50% key accounts · 30% growth targets · 20% prospecting
- **Buyer hours, not your hours:** skip the lunch rush, the dinner rush, and Friday nights. Ask each buyer when they'd like to see you and write it in the CRM.
- **20+ hours a week** on selling, protected on the calendar

STARTER KIT: ACCOUNT TRACKER (VISIT CADENCE) AND VISIT LOG TABS



SECTION 4 · SELLING

Sell-In

Equipment
Sample kit (within your state's sample rules) · phone or tablet with your order form · printed sell sheets

People
Whoever sells gives it 20+ hours a week. If that isn't you, outsource it.

Paperwork
Sell sheet · price list · order form · new-account setup form (license #, buyer, billing contact, delivery window)

Process
Target list → research the account (menu, tap list, shelf, Untappd, BeerMenus) → book the visit → specific ask (one tap, two SKUs) → follow up within 48 hours

Systems
Prospecting blocked on the calendar so deliveries can't eat it

What good looks like
Every call logged, every follow-up on time, a target list that shrinks because accounts said yes

AI: before a visit, summarize the account's menu and draft three talking points · after, record a voice memo and turn it into a clean CRM note

STARTER KIT: SALES MATERIALS TAB · TECH & TOOLS TAB ("PREP FOR A SALES VISIT" AI PROMPT)

SECTION 4 · SELLING

The Sales Call, Step by Step

1. **Do your homework:** menu, tap list, shelf, who they carry, what's missing
2. **Book it:** an appointment beats a drop-in
3. **Open short:** who you are, why you're there, how long you'll take
4. **Ask before you pitch:** what's selling, what's not, who their customers are
5. **Pitch to the gap:** one or two beers that fit what they just told you
6. **Taste it** where your state's rules allow
7. **Make the ask:** one tap, two SKUs, a tasting date
8. **Handle the "no, because"** (next card)
9. **Lock the next step:** an order, a delivery day, or a follow-up date
10. **Follow up within 48 hours** and log it in the CRM

Ask more questions than you answer. Buyers buy from people who listened.

STARTER KIT: VISIT LOG TAB

SECTION 4 · SELLING

Handling Objections

- **"I don't have room."** Ask what's rotating next, or what would have to come off. Offer to take the rotator.
- **"It's too expensive."** Talk about what it earns them per pour or per shelf turn. Your price is the same for every account, so sell the value.
- **"I already have a local IPA."** Pitch the gap instead: the style, format, or price tier they're missing.
- **"My customers don't know you."** Bring the pull-through plan: staff training, a tasting, the product finder, your posts sending people their way.
- **"Come back later."** Pick the date before you leave and put it in the CRM.

Every "no" comes with a reason. Find it, write it down, come back with the fix.

STARTER KIT: VISIT LOG TAB (WRITE DOWN EVERY "NO, BECAUSE")



SECTION 4 · SELLING

Rep Best Practices

Do This

- Book appointments and show up on time
- Bring one specific ask
- Know your price, your margin, and what's moving
- Train the staff. The bartender sells for you after you leave.
- Ask for the reorder
- Do what you said you'd do, when you said you'd do it
- Log every visit in the CRM

Not That

- Drop in during the lunch rush
- Pitch your whole lineup
- Trash-talk the competition
- Offer deals you can't legally offer
- Promise delivery days you can't keep
- Disappear after the first order
- Keep it all in your head

Selling into off-premise accounts is different from selling into on-premise accounts.

SECTION 4 · SELLING

Who Sells? Rep Options

- **Owner as rep:** cheapest and most passionate, least available. 20 hours a week minimum, protected on the calendar.
- **Part-time rep:** local, hourly, with a bonus on new placements and reorders
- **Full-time rep:** when the volume can carry the salary
- **Contract sales agency or brand ambassador:** pay for results, give up some control

Start variable before you add fixed costs. Low overhead keeps the margin.

Rep licensing rules vary by state. Vermont: ask the VBA.

STARTER KIT: READY CHECK TAB (THE 20-HOUR RULE)



SECTION 5 · ACCOUNT MANAGEMENT

Service Like a Distributor

Equipment
Merch kit in the van: box cutter, rag, shelf tags, approved POS

People
The person who sold it services it, or there's a clean handoff

Paperwork
Account profile (buyer, best time, delivery window, license #, payment method) · visit log

Process Tier A/B/C → A every delivery, B every two weeks, C monthly or by phone → every stop: rotate, face, pull out-of-code, check draft quality, five-minute staff talk, ask about the next order

Systems Visit split: 50% key accounts, 30% growth targets, 20% prospecting · reorder reminders in the CRM

What good looks like You hear about a problem from your own visit before you read about it in a one-star review

Stock and rotate your own product. Leave other brands alone.

AI: Monday morning, export the CRM and ask for the short list: no reorder in [X] weeks, shrinking orders, who to visit this week

STARTER KIT: ACCOUNT TRACKER AND VISIT LOG TABS



Train Your Accounts

Yes, I said train them.

- **Set expectations from day one:** how to order, your order cutoff, your delivery day, and how they pay
- **Can't be there in person every week? Tell them.** Then show them how ordering works instead.
- **Automating something? Tell them that too:** online order form, reorder reminders, digital invoices
- **Market to them digitally** as much as you can: buyer emails, texts, and release calendars
- **Buyers will always want more in-person visits.** If you're a small team, don't overpromise and underdeliver on attention and service.

Set the expectation once, or reset it every single week.

STARTER KIT: ACCOUNT TRACKER (DELIVERY WINDOW, BEST TIME, PAYMENT METHOD) AND MARKETING CHECKLIST (BUYER EMAILS AND TEXTS)

SECTION 5 · ACCOUNT MANAGEMENT

Accounts Receivable

- **Payment is on delivery in Vermont,** so the money has to move when the beer does
- **Go digital as much as possible:** EFT through Fintech, Ekos Order Hub, QuickBooks Online invoicing and payments
- **Paper checks and cash turn AR into somebody's second job:** deposits, chasing, matching payments to invoices
- **Automate it:** invoices created from the order, payment status synced to your accounting, one weekly "who owes us" check
- **Protect your selling time.** Every hour spent chasing payments is an hour you're not in the market.

Automate AR, or it eats your selling time.

STARTER KIT: ACCOUNT TRACKER (UNPAID BALANCE) AND TECH & TOOLS (PAYMENT SOFTWARE)

SECTION 6 · MARKETING

Marketing That Moves Product

Regular brand marketing keeps going. Wholesale gets added on top.

- **Product finder** on your website. Send every wholesale post and ad there.
- **You can advertise to promote wholesale, with guardrails:** 3 or more retailers per post, no retail prices, retailer names kept low-key, never pay toward a retailer's ad
- **Taproom to retail:** a "find us at" table tent, and tell regulars where to buy you when you're closed
- **Listings:** Google Business Profile posts, Untappd for Business, BeerMenus
- **Budget:** materials and POS come from brand advertising; demos, promos, and samples come from trade spend

Tech: Elfsight for the product finder · Untappd for Business to keep pour lists current

STARTER KIT: MARKETING CHECKLIST TAB



SECTION 6 · MARKETING

B2B Marketing: Market to the Buyer

- **Email:** a monthly buyer email with what's new, what's coming, and how to order
- **Text:** order cutoff reminders the day before, new release heads-ups (opt-in only)
- **Tools buyers keep:** sell sheets, a release calendar, staff cheat cards

What good looks like: buyers know what's coming before they ask, and reorders land before they run out

AI: drafts the monthly buyer email from your release calendar. You edit and send.

STARTER KIT: MARKETING CHECKLIST TAB (EMAIL AND TEXT TEMPLATES)



SECTION 7 · DATA

Track It From Day One

- **CRM is non-negotiable.** Every account, contact, order, and visit. If it isn't in the CRM, it didn't happen.
- You don't need a big fancy platform until you're aligned with a wholesale partner. A free CRM, a spreadsheet, and your accounting software will carry you.

Weekly numbers:

active accounts	**placements**	**reorder rate**	**days between orders**
CEs per account	**who owes you**	**cost per stop**	

Paperwork: invoices and delivery records organized by account. Your state reports run off them.

What good looks like: ten minutes on Monday tells you who to call, who to visit, and who's slipping

AI: paste the weekly export into AI for a one-paragraph summary. Turn off model training in settings and keep customer data out of free tools.

STARTER KIT: ACCOUNT TRACKER AND VISIT LOG TABS

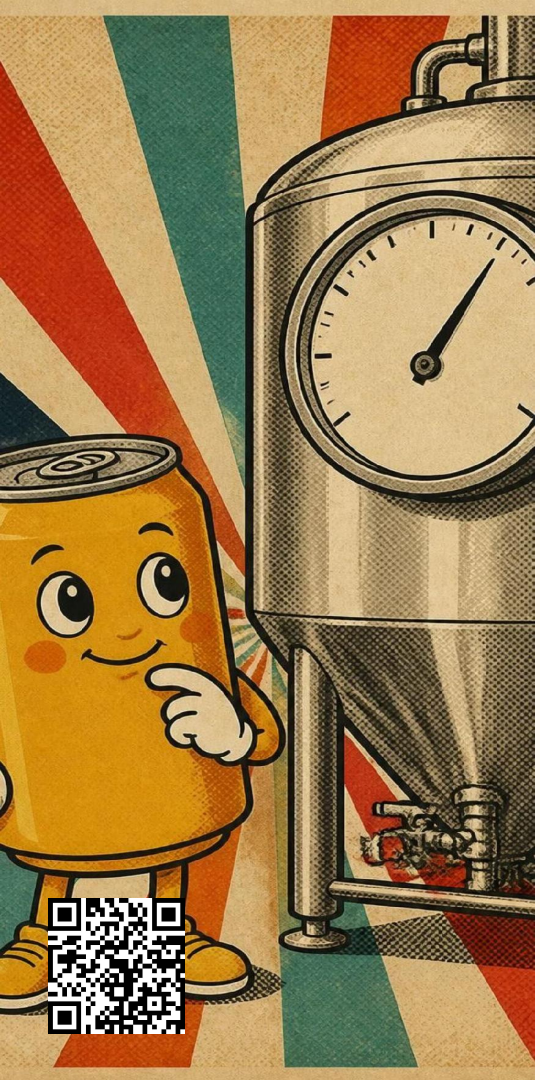


Don't Expect Immediate ROI

- **Wholesale takes time.** One or two visits to a retailer won't make a sale happen overnight.
- **Buyers have to know, like, and trust you** before they make room for you
- **It will feel slow,** like you're spinning your wheels. That's normal.
- **Keep showing up:** steady visits, follow-ups, and service are what build the relationship
- **Track the work while the sales catch up:** visits, follow-ups, tastings, first placements

Trust the process.

STARTER KIT: VISIT LOG TAB



SECTION 8 · SCALE ON PURPOSE

Grow Without Breaking the Brewery

- Low overhead is your margin. Every fixed cost you add (van, salary, warehouse) needs the volume to pay for it first.
- Widen the circle when your current zones are full and serviced well
- Pick your triggers now: deliveries eating selling time, a zone that's full, kegs running short
- Capacity check: production, cold storage, kegs, van space, your hours
- Software as you grow: Repsly or Badger Maps for field sales · Ekos or OrchestratedBEER for brewery ops
- The sales history you build makes you a stronger partner if you add a wholesaler later

Add the cost after the volume shows up.

STARTER KIT: ROUTE PLANNER (ROUTE COST CHECK) AND ACCOUNT TRACKER (MONDAY CHECK)



SECTION 9 · 30 / 60 / 90 DAYS

Your First 90 Days

Day 30

Ready check done · price list and sell sheet · CRM live · delivery map and delivery days · short target list · trade practice rules confirmed with the VBA

Day 60

Routes running on schedule · A/B/C tiers and visit cadence · product finder live · first buyer email · first promo on the trade spend budget

Day 90

First real data review · adjust routes · decide on sales help (the 20-hour rule) · widen the circle only if the backyard is solid

Homework, pick ONE: build your delivery-day map this week.

If you have customers, you have a business, not a hobby.

STARTER KIT: START HERE TAB



Thanks!

Reach out anytime

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Digital Swag Bag!