HALVERSON PIPE & SUPPLY · INSIDE SALES

Daily Report

Tuesday, October 27, 2026

SAMPLE

REPORT DATE 2026-10-27 · GENERATED Wed Oct 28, 6:47 AM ET

INBOUND CALLS	OUTBOUND CALLS	ANSWER RATE	AVG DURATION	SENTIMENT	FOLLOW-UPS
61	48	90.2%	4:12	68% positive	9
Dana 22 Marcus 19 Tessa 14 · 6 missed	Dana 17 Marcus 21 Tessa 10	55 of 61 on the sales lines	across 103 rep calls	24% neutral · 8% negative	37 orders placed

SALES · ERP ORDER LINES, SO / WB / IS

	TODAY	VS MON 10/26	VS TUE 10/20	VS TUE 10/28/25	MONTH TO DATE
Inside sales	$48,630	+$7,425 $41,205	-$3,480 $52,110	+$8,760 $39,870	$892,415
Dana Kowalski	$19,880	+$3,940 $15,940	-$1,520 $21,400	+$3,670 $16,210	$364,120
Marcus Reed	$21,470	+$3,155 $18,315	-$1,510 $22,980	+$4,420 $17,050	$389,705
Tessa Lin	$7,280	+$330 $6,950	-$450 $7,730	+$670 $6,610	$138,590

HOW DID YOU HEAR ABOUT US?

55 answered inbound calls

Google search	Existing customer	Other / no reason
17 calls	29 calls	9 calls
$6,840	$31,215	$2,410
from these callers today	from these callers today	from these callers today

REP PERFORMANCE

Dana 39 calls · avg 4:38
BEST (614) 555-0142 · 11:52
Closed Rios Mechanical: six 50-gallon commercial heaters, $9,870 on card.

Marcus 40 calls · avg 3:51
BEST (614) 555-0118 · 9:07
Northgate PO: 140 frost-free hose bibbs plus heat tape, $6,412.

Tessa 24 calls · avg 4:05
BEST (614) 555-0163 · 14:20
Quoted Pell & Sons a 12-unit PEX repipe and tankless package, ~$13,480.

ALERTS · REVENUE AT RISK $5,000+

$23,960 total

Hartley Residential Marcus — $18,360
Comparing our 30-unit tankless quote with a second bid and wants venting kits included. Send the revised quote by Wednesday noon.

Ortiz Plumbing Tessa — $5,600
Card declined twice on a 14-heater school order; owner is calling his bank. Send a pay link at 10 AM.

MARKET FLAGS · FROM TODAY'S TRANSCRIPTS

Tankless retrofits reach multifamily — GREEN

"We're pulling the old tanks out of all twelve units, and the owner wants tankless this time."

Two apartment jobs asked for tankless in one day. Pell & Sons wants 12 units at $715 alongside a PEX repipe (~$13,480 together), and Hartley Residential is pricing 30 units for a full retrofit (~$18,360). Both owners asked about venting kits, which neither quote includes yet.

RPZ repair kits out until Nov 9 — RED

"If you can't get me the kit by Friday I have to find it somewhere else."

Three contractors asked for 1-inch RPZ repair kits ahead of fall backflow testing: Dalton Fire & Water, Kemper Plumbing and A-1 Drain. The vendor shows Nov 9. Kemper bought elsewhere (~$640); Dalton and A-1 (~$1,650 combined) agreed to wait if we confirm the ship date in writing.

Managers stocking for first freeze — GREEN

"Every year the first cold snap catches us, so I want the heat tape on the shelf now."

Northgate Property Group ordered 140 frost-free hose bibbs with heat tape ($6,412), and Lakeview Senior Residences bought pipe insulation and shutoff valves ($3,180). Two more managers asked for pricing. A freeze-prep call list to property management accounts would catch the rest this week.

Faucet prices checked against online — RED

"I found the same faucet online for about forty dollars less. Can you do anything there?"

Two contractors quoted online prices on kitchen faucets. Marcus held price on one by pointing to same-day will-call and warranty handled at the counter. The other, Brennan Remodeling, has 8 faucets (~$1,180) still open and wants an answer by Thursday.

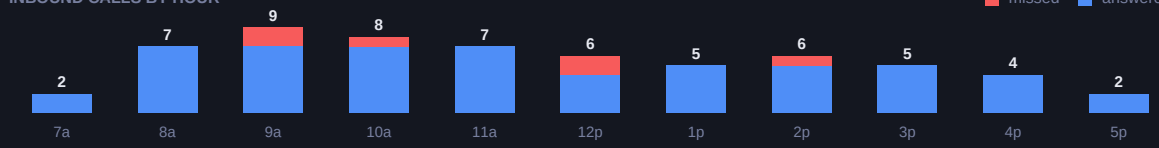
TOP FOLLOW-UPS

MARCUS Hartley Residential (Jim Hartley) (614) 555-0187
30 tankless units for a full retrofit at $612 each, ~$18,360 before venting. Owner has two more buildings on the same street.
NEXT Revised quote with 30 venting kits by Wednesday noon; Jim decides Thursday.

TESSA Pell & Sons Plumbing (Ray Pell) (614) 555-0163
12-unit PEX repipe (~$4,900) plus 12 tankless heaters at $715, ~$13,480 if both land.
NEXT Send the combined quote today with delivery split across the weeks of Nov 9 and Nov 16.

DANA Lakeview Senior Residences (Andrea Voss) (614) 555-0129
Bought $3,180 in freeze prep today. Replacing 40 shower valves in the east wing next quarter, ~$6,600 at current pricing.
NEXT Book a walkthrough to spec the valves before she sets the December budget.

INBOUND CALLS BY HOUR



REVENUE BY PRODUCT LINE

$48,630

Water heaters	$14,920
Fixtures & faucets	$10,385
PEX, pipe & fittings	$9,760
Valves & backflow	$6,240
Pumps & tanks	$4,615
Tools & other	$2,710