

Sales Self-Service Ordering Platform

Internal Product | B2B Sales Enablement | Product Lead

Overview

I led the design and development of a custom self-service ordering platform to replace fragmented, manual sales workflows and create a scalable, structured system for order creation, validation, and submission.

What began as a tactical solution evolved into a foundational product that standardized how orders flow through the business and served as the first working prototype for a future Sales Portal ecosystem.

The Problem

Sales reps relied on handwritten forms, emails, and spreadsheets to build and submit orders. This created systemic inefficiencies:

- Inconsistent and incomplete order data
- Frequent pricing errors and manual corrections
- Time-consuming back-and-forth between sales, operations, and production
- No standardized workflow across reps or accounts
- Limited visibility into order data for reporting and forecasting

As order volume grew, these issues became a scaling bottleneck, impacting both revenue and operational efficiency.

Opportunity & Approach

Rather than waiting for a full-scale portal build, I identified an opportunity to:

- Solve immediate workflow inefficiencies
- Standardize business rules and order structure
- Validate pricing and fulfillment logic
- Capture clean, structured data
- Establish a foundation for future system architecture

I proposed and executed a functional product approach, building a working system that delivered immediate value while informing long-term platform strategy.

My Role

Product Lead (Strategy, UX, UI, and Full-Stack Implementation)

I owned the product end-to-end, from initial concept through development, launch, and adoption:

- Defined product vision, strategy, and phased roadmap

- Conducted user research across sales and operations to identify workflow gaps
- Mapped the full order lifecycle and uncovered key friction points
- Designed UX flows, interaction patterns, and UI components
- Translated business needs into detailed product requirements and logic

Technical Ownership

- Architected and developed the custom WordPress plugin from the ground up
- Built dynamic front-end interactions (JavaScript) and backend logic (PHP)
- Implemented pricing engines, validation rules, and structured data handling
- Designed draft-saving, data serialization, and export functionality (CSV/PDF)
- Ensured performance, reliability, and scalability within the WordPress environment

AI-Assisted Development

- Leveraged LLM tools to accelerate development, troubleshoot issues, and iterate quickly
- Maintained full ownership of system architecture, logic design, and implementation decisions
- Used AI as a productivity tool while ensuring code quality, maintainability, and alignment with business requirements

Cross-Functional Leadership

- Collaborated with stakeholders to align on architecture and business rules
- Prioritized features and managed iterative releases
- Led rollout, training, and adoption across sales teams and operations

Key Insights

Through discovery and hands-on workflow analysis, several critical issues emerged:

1. Order inconsistency was systemic

Each rep approached order entry differently, creating variability and downstream confusion.

2. Pricing complexity drove errors

Decoration types, garment categories, and size breaks introduced frequent manual mistakes.

3. Operational logic was undocumented

Fulfillment rules existed in tribal knowledge rather than enforceable systems.

4. Data was unstructured and unusable

Order data couldn't be reliably used for reporting, forecasting, or automation.

The Solution

I designed and built a dynamic, structured ordering platform that transformed how orders are created and processed.

Core Capabilities

Structured Order Configuration

- Multi-item order building with dynamic SKU rows
- Standardized inputs and required field validation
- Consistent data capture across all reps

Real-Time Pricing & Logic Automation

- Category-based pricing matrices
- Decoration-specific pricing rules
- Automatic price breaks and size upcharges
- Live calculation of totals

Workflow Validation & Error Reduction

- MOQ enforcement and warnings
- Auto-population of common selections
- Guardrails to prevent incomplete submissions

Rep-Centered Experience

- Draft save and resume functionality
- Reduced cognitive load through defaults and automation
- Faster, more intuitive order entry

Structured Outputs for Operations

- Clean, standardized order summaries
- CSV and PDF exports for production workflows
- Consistent formatting for internal communication

Impact

The platform delivered measurable improvements across the business:

- 75% adoption within the first month
- 40–60% reduction in order entry time
- 50–80% reduction in order errors
- Significant decrease in back-and-forth between sales and operations
- Improved consistency and scalability in order processing

Key Product Decisions

1. Designed for adoption first

Prioritized speed, clarity, and ease-of-use to ensure reps would actually use the system.

2. Balanced flexibility with structure

Enabled custom orders while enforcing standardized data and business rules.

3. Reduced cognitive load

Automated pricing, defaults, and validations to minimize manual effort and errors.

4. Built iteratively with real users

Continuously refined the product based on live rep feedback and usage patterns.

Strategic Outcome

This project evolved beyond an order form into:

- A standardization engine for sales and operations workflows
- A validation layer for pricing and fulfillment logic
- A structured data source for reporting and future automation
- The first functional module of a larger Sales Portal vision

Looking Forward

The platform directly informs the next phase of product development:

- Customer database and account management
- Centralized pricing engine
- Order lifecycle tracking
- Reporting and analytics dashboards
- Modular Sales Portal architecture

By solving immediate operational challenges while validating long-term system requirements, this work accelerated Perrin Sportswear's transition toward a scalable, product-driven sales infrastructure.