COMPANY XYZ

EcSell Institute / ONE-UP Implementation Path

Activity	Company XYZ Role	EcSell Institute Role	Target Date
EcSell Institute kick-off call	• Senior sales leader attends call to discuss needs and goals of membership	• Lead call to learn member's needs and goals	Month 1
EcSell Institute membership path review	• Senior sales leader attends call to discuss needs and goals of membership	• Create customized membership path • Lead call to discuss	Month 1
EcSell Institute partnership introduction	• Team attends web conference to learn about EcSell Institute resources and membership path	• Lead the web conference	Month 1
Introduction to sales coaching concepts and best practices	• Attend web conference/ on-site meeting	• Lead web conference/ on-site meeting	Month 2
ONE-UP customization session one	• Attend customization call to identify key areas within ONE-UP to be personalized • Provide EcSell with list of user info. (EcSell will send form that can be filled out and returned electronically)	• Lead call to review and define member's areas of customization • Customize ONE-UP per member recommendations • Set up a company profile and individual user profiles	Month 2
ONE-UP education session one	• Attend ONE-UP education session • Practice entering in activities, notes, uploading photos scheduling, etc.	• Lead sessions on: "How to use your dashboard," and "How to complete activities" • Provide technical support as needed	Month 2
ONE-UP education session two	• Attend ONE-UP education session two general / Q&A relating to user experience	• Lead ONE-UP education session two general / Q&A relating to user experience	Month 3
Execute Through the Eyes of the Rep Survey	• Send EcSell Institute list of rep names and emails, organized by manager • Announce survey to managers and reps	• Send survey announcement language • Set up and administer survey	Month 3
Feedback on Through the Eyes of the Rep Survey	• Attend team web conference on the survey results	• Generate survey reports • Lead web conference on the survey results	Month 3

Best practice education session one	• Attend best practice education session on:
	  o One-to-one meetings
		• Lead best practice education session on:
		  o One-to-one meetings
			Month 4

	o Pre-call plans o Sales call evaluations	o Pre-call plans o Sales call evaluations	
Senior leadership session one	• Attend 1-to-1 web conference to review ONE-UP data on best practices implementation	• Lead 1-to-1 web conference to review ONE-UP data on best practices implementation	Month 5
Team synthesis session one	• Attend team web conference to review ONE-UP data on best practices implementation	• Lead team web conference to review ONE-UP data on best practices implementation	Month 6
ONE-UP customization session two	• Attend customization call to identify key areas within ONE-UP to be personalized	• Lead call to review and define member's areas of customization • Customize ONE-UP per member recommendations	Month 6

Best practice education session two	• Attend best practice education session on:
	  o Career development plans
	  o Team meetings
		• Lead best practice education session on:
		  o Career development plans
		  o Team meetings
			Month 7

Senior leadership session two	• Attend 1-to-1 web conference to review ONE-UP data on best practices implementation	• Lead 1-to-1 web conference to review ONE-UP data on best practices implementation	Month 8
Team synthesis session two	• Attend team web conference to review ONE-UP data on best practices implementation	• Lead team web conference to review ONE-UP data on best practices implementation	Month 9
ONE-UP customization session three	• Attend customization call to identify key areas within ONE-UP to be personalized	• Lead call to review and define member's areas of customization • Customize ONE-UP per member recommendations	Month 9

Best practice education session three	• Attend best practice education session on:
	  o Sales activity calculator
	  o Team retreats
	  o Sales skills audit
		• Lead best practice education session on:
		  o Sales activity calculator
		  o Team retreats
		  o Sales skills audit
			Month 10

Senior leadership session three	• Attend 1-to-1 web conference to review ONE-UP data on best practices implementation	• Lead 1-to-1 web conference to review ONE-UP data on best practices implementation	Month 11
Team synthesis session three	• Attend team web conference to review ONE-UP data on best practices implementation	• Lead team web conference to review ONE-UP data on best practices implementation	Month 12